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ABSTRACT

The materials in this manual are designed to help workshop leaders prepare for and present workshops for school board members on a process of self-assessment for the school board or the district management team. Two levels of workshop are treated: the first level is designed for presentation in a large group format and introduces the concepts relevant to self-assessment; the second level is intended to provide technical assistance to individual school boards in preparing for and conducting the feedback sessions called for by the self-assessment process. The manual consists of six sections: an introduction; three sections on planning, presenting, and evaluating the workshops; a selection of resource materials; and booklets for workshop participants. The discussion of planning covers the focus and scope of the workshop, familiarization with relevant materials (including the format of the manual), and the grouping of participants. The presentation section includes sequential descriptions of workshop activities, leader focuses for each activity, and instructions for conducting the activities. The resource materials provided include papers explaining the self-assessment process and discussing the four central functions of the school board, and masters from which transparencies can be reproduced for projection at the workshops. (Author/PGD)

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SCHOOL BOARD SELF ASSESSMENT

Keys to School Boardsmanship

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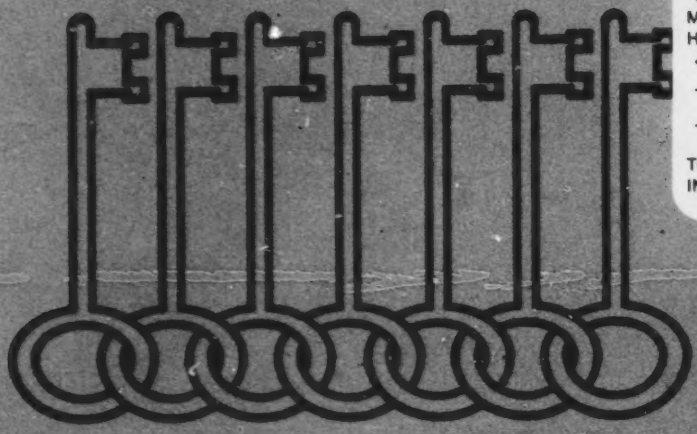

A Program of Continuing Education for School Board Members

EA 015 211

Northwest Regional Educational Laboratory
[illegible] • Portland, Oregon 97204

These materials have been produced as part of "Keys to School Boardsmanship," a project to develop new materials in boardsmanship education for local school board members. It is a joint effort among:

- The Association of Alaska School Boards
- The Idaho School Boards Association
- The Montana School Boards Association
- The Oregon School Boards Association
- The Washington State School Directors' Association
- The National School Boards Association
- The Northwest Regional Educational Laboratory

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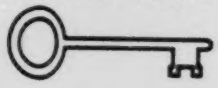
KEYS TO SCHOOL BOARDSMANSHIP



Northwest Regional Educational Laboratory

Management Team

Self-Assessment

leader's manual

developed by

Leslie G. Wolfe, Ed.D

Prologue:

This manual is one in a series of thirteen developed by the Northwest Regional Educational Laboratory (NWREL) as part of the "Keys to School Boardsmanship" project.

The workshop programs resulting from the project are intended to help strengthen local school boards through continuing education.

The workshops in the series have been thoroughly tested by NWREL staff and by the staff of state school board associations in Alaska, Idaho, Montana, Oregon and Washington. These programs have been found to be extremely useful as tools for strengthening continuing education services to school board members.

The "Keys to School Boardsmanship" materials are now being published and distributed by the National School Boards Association (NSBA). In addition, the NSBA is developing a national center designed to assist state associations to make the best use of the material.

Thirteen manuals in the series now available from NSBA include:

- Board/Administrator Relations
- Building Bridges: School Board Political Roles
- Communicating with the Community
- Conflict: Alternatives to Blowing a Fuse
- Effective School Board Meetings
- The Educational Management Team
- Policy Development
- Policy is Power
- Program Evaluation: School Board Roles
- What Do School Boards Do?
- School Board Self-Assessment
- School Improvement: A Tune the School Board Can Play
- Teamwork: The Board and Superintendent in Action

SCHOOL BOARD (MANAGEMENT TEAM) SELF-ASSESSMENT

SECTION 1: INTRODUCTION

Purpose and Rationale

Public concern about the job performance of its elected and appointed officials has increased the interest of school board members in the personnel evaluation process. Forward-looking board members and administrators are calling for evaluation processes that can be used to help the public schools plan for improvements. These same top level management people realize that personnel evaluation starts at the "top" with the board of education. The board of education can, through "modeling," set the appropriate climate for improvement by first evaluating its own interactions and goals. If the board of education knows where it is and where it is going, it will be in a stronger position to provide a solid front and leadership to the school staff and the community.

This program was designed to provide a school board with a general assessment of the needs and interactions of the school board. The results of this questionnaire will provide the board with information about its areas of greatest concern. The school board may find that it will choose to investigate several of the areas in greater depth. The board may wish to use this information to plan its own program of professional growth.

Organization of the Leader's Guide

The Leader's Guide contains the basic directions and materials you will need to plan the workshop. Any additional information or experience that you can bring to the workshop will serve to strengthen your presentation.

Section 2: Planning the Workshop

Section 2 contains information about preparations the leader needs to make before presenting the workshop. Included are hints and suggestions about:

- Focus and scope
- Objectives and time estimates
- Becoming familiar with the material
- Reviewing Section 3
- Skills needed
- Organizing for learning

- Use of transparencies
- Warnings
- Equipment needed

Section 3: Presenting the Workshop

Section 3 includes a step-by-step description of the workshop procedures, along with the time allocations and the required resources.

Level One--Presenting the Self-Assessment workshop to large groups. In addition you will find:

- A sequence of workshop activities
- Specific instructions and references to participant materials and audio and visual aids
- A leader focus for each workshop activity
- Helpful hints about workshop activities

Level Two--Preparation for the feedback session and the feedback session itself. The feedback session will also include:

- A sequence of workshop activities
- Specific instructions and references to participant materials and audio and visual aids
- A leader focus for each workshop activity
- Helpful hints about workshop activities

Section 4: Evaluating the Workshop

Section 4 contains the procedure used for evaluating the workshop.

- The background of the development and testing of this workshop

Section 5: Resources

This section contains reading material which the leader will need to become familiar with before presenting the workshop. Included in this section are:

- Concept papers
- Background reading and references
- Further explanation of ideas developed in the workshop

Section 6: Participant Materials for the feedback session

SECTION 2: PLANNING THE WORKSHOP

Focus and Scope

The school board (management team) self-assessment process represented in this notebook is organized around two levels of presentations to school boards/ management teams. The first level presented in Section 3, Presenting the Workshop, provides a basic format for delivering a workshop on the self-assessment process to a large group. The activity is organized around a lecture mode. This section was not designed to be used with individual school boards. The objectives of this level are:

1. To introduce large groups of participants to the self-assessment feedback process

2. To establish with the participants that every organization has two levels of concerns:

   - Human concerns
   - Task concerns

3. To develop the notion with the participants that it is normal, natural and expected that different people have different levels of human and task concerns

4. To introduce the notion that every organization or group either consciously or subconsciously works through each of the categories on the self-assessment instrument.

Time Estimates

Level One Workshop	Time
Activity 1: Presentations to Large Groups	1 hour, 5 minutes
Activity 2: SBSA Process	18 minutes
Activity 3: Evaluating the Workshop	10 minutes

The second level in Section 3 is developed around two divisions, preparation for the feedback session (page 23) and presenting the feedback session (page 29).

Each of these two divisions was designed to facilitate the delivery of the school board (management team) self-assessment process to an individual school board. This level is called the technical assistance mode and requires the highest level of knowledge and understanding of the leader. The goals and objectives of this level are:

Goal

The goal of the school board (management team) self-assessment process is to stimulate a dialogue among the participants about their areas of concern and hopes for the future.

Objectives

1. To create an environment that encourages an open, free, honest discussion concerning the operation of the school board

2. To create an atmosphere that encourages a discussion of organizational and individual needs

3. To use the self-assessment instrument to stimulate new ideas about the operation of the school board

4. To create an atmosphere in which the participants will agree to a written plan of action that takes into account the school board's needs and individual board members' needs

Time Estimates

Level Two Feedback Session	Time
Activity 1: The Feedback Session	1-1/2 to 2 hours
Activity 2: Goal Setting	40 minutes

Becoming Familiar With the Materials

This workshop has been designed around a very specific notion about the school board's role in school improvement. The papers presented in Section 5 of this notebook were developed to provide the leader with the background, research and theory upon which this workshop is built. They do not represent the last word on the subject, and any additional research and reading that the leader can bring to the subject will strengthen the presentation.

Reviewing Section 3, Presenting the Workshop

Section 3 of the Leader's Guide is a step-by-step outline for presenting the workshop. There are a number of "cues" that have been used to assist you as leader in the presentation:

- Activity

  Each unit of instruction is identified by an activity number and title, both of which are underlined, e.g., Activity 2: Defining the Learning Program. Each activity stands as a unique unit of learning with its own objectives, participant activities and basis of knowledge. The various activities are related in that they are all part of a larger common concept, in this case, program evaluation. (See Figure 1a.)

- Leader Focus

  Immediately underneath the activity number and name there is a heading, Leader Focus, that is also underlined. The Leader Focus provides the leader with a "mind set," a "feeling," an "attitude" or an "anticipatory set" that the leader should attempt to establish in this unit of instruction. The Leader Focus might be defined as the "affective" objective for the unit. (See Figure 1b.)

- Time

  The total time required for each activity will be located at the top left hand column of the first page of the activity. Additional divisions of time within the activity will also be noted in the left hand column. (See Figure 1c.)

- Materials

  The right hand column of each page will list the materials, transparencies, workbook references or other activities for instruction that need to be brought to the attention of the leader. The references will be noted in the right hand column next to the appropriate point of instruction. (See Figure 1d.)

  The middle section will use three cues. They are:

  - Leader Instructions
    - Subpoints
  - Leader Lecture
    - Subpoints
  - Capitalized Words
    - Subpoints

- Leader Instructions

  The cue, Leader Instructions, alerts you, as the workshop leader, to something you must do, say or cause to happen. Each of the following bulleted points "o" (see Figure 1e) are additional sequential cues.

- Leader Lecture

  The cue, Leader Lecture, alerts you that at this point in the workshop you are expected to provide a knowledge base or lecture about a given subject. The main points in the lecture will be outlined in the following paragraphs until you reach a new cue. You will also find in Section 5 papers that will provide additional background for the lecture. It is best to make the main points in your own language or words. Do not read the lecture. (See Fig 1f.)

- Capitalized Words

  The cue of CAPITALIZED WORDS within the general framework of the text alerts you to the advisability of reading the exact words to the participants. The exact words in this case will help direct all the participants through the planned learning activity. (See Figure 1g.)

- The cue "--" is used to alert you to subpoints that may be used to add to or clarify a thought or statement. (See Figure 1h.)

- Helpful Hints is a cue that will appear at the end of some activities. Its intent is to cue you into something that will help make the workshop more successful. (See Figure 1i.)

- A solid line across the entire page will be used to indicate the end of the activity. (See below and Figure 1j.)

Figure 1 on the following page is a visualization of what might occur in one unit of instruction.

FIGURE 1

TIME		MATERIALS (d)
(c)		
Total Time: 30 min.	Activity 2: Defining the Learning Program (a)	
	Leader Focus: (b)	
		(d)
	o Leader Instructions: (e)	Trans. SA 1
	o (e)	
	o (e)	
	— (subpoints) (h)	d)
	— (subpoints) (h)	Workbook Page 2
	(g)	
20 min.	o Leader Lecture: (f)	
	o (f)	
	o Ask them, IF THE SCHOOL BOARD IS IN CHARGE, WHY DON'T YOU DO IT? (g)	
	— (subpoints) (h)	
(i)		
	Helpful Hint: Move this section very fast...	
(j)		

Skills Needed for the Workshops

Before you make a decision to use these materials, you might take a few minutes and think through four interrelated decisions you should consciously make. All workshop leaders or teachers make the same decisions. The only difference is that a few understand they are making the decision, and the others do it by the "seat of their pants," or as Madeline Hunter says, "like egg on a wall you may or may not hit the spot." The decisions are: first, what are the needs of the participants; second, how much time do you have to work with the participants (one time only for one hour, several times for one hour, one time for four hours, etc); third, what extent of knowledge do the materials represent; and fourth, what are your skills in workshop leadership and competencies in the subject matter?

Participant Needs

In any workshop the participants will come to the program with a variety of needs, beliefs and styles. Most adults learn best about that which they can immediately use. However, within that statement there is a range of participants; there is one group that just wants to learn about the idea, still another group that wants to develop skills and a third group that wants to immediately apply the information. Of course, it takes less time to expose a person to an idea, more time to teach participants a skill, and even more time for them to learn how to apply and use the skill.

At the same time, many participants come to a conference solely for the opportunity to socialize, discuss current issues and to strengthen and enlarge their interactions and acquaintance with other school board members. The materials in this workshop were designed to meet these "inclusion" and "belongingness" needs through controlled small group discussions and interactions. The word "controlled" is used because these same adults have a need to appear to be in control, and at the same time, they want the workshop to be in control, and be of value and present a worthwhile learning experience.

Small group interactions are an important foundation of the design because they also encourage "feedback." Adults need the opportunity to apply and try out new knowledge. Adults need to know where they stand. They need an opportunity to test new ideas and to make mistakes. The small groups allow the freedom and create the control needed to reinforce described learning outcomes and to help mistakes become valuable learning opportunities.

The use of small groups provides a balance between the "expert" workshop leader and the "experience-based" school board member. The small groups create an opportunity for the school board member to test his/her experiences with the ideas of the presenter.

Any attempt to reduce the small group interactions in this workshop in order to "give more information" will surely "gut" the basis of the design and ignore the needs of the participants.

Time

The critical element in learning is time. The biggest mistake you can make is to attempt to build skills or force technical application of knowledge without enough time. Time relates to learning. You must relate the time available to the needs of the participants. The critical decision is whether you have enough time to meet the participants' needs and the objectives. A workshop designed to develop skill will take more time than one designed to expose the participants to an idea.

Level of Materials

The research and development of the concepts and materials in this workshop centered on three levels. The first level was identified as the "introduction level," defined as representing enough of the generalized concepts in the subject area to present a current overview of the subject matter. The second level was identified as "skill building," which was described as representing the basic skills in the subject matter. Finally, the third level was identified as the "technical assistance level," representing an expansion of the basic skills to include application, analysis, synthesis and evaluation skills.

The materials in this workshop were developed to be used at an exposure or skill-building level. The skills that are represented in the materials are specific and by no means represent a complete view of the knowledge on the subject. If the workshop leader or association representative is expected to work at a technical assistance level with an individual school district, he/she would surely be expected to bring additional knowledge and skills to the experience.

Leader Knowledge and Skill

A leader with a minimum amount of skill and knowledge should be able to present the workshop at both an introduction and skill building level by following the suggested steps in the Leader's Guide. In this case, you should stay very close to the suggested outline. After presenting the workshop several times, you may then be ready to create your own choices within the materials. If, on the other hand, you are an experienced workshop leader with an extensive knowledge in the subject area, the materials in the Leader's Guide may well serve only as a reference or guide. In this case, you may choose to alter the material to meet your own style or workshop objectives.

The concept papers and other materials in the reference section of the Leader's Guide provide a ready reference for the growing leader who wishes to expand beyond the structured material. Just about any material including the most complex mathematical problems can be delivered with a structured, mechanical knowledge level approach. The growing, creative workshop leader will move to a higher level of understanding--application, analysis, analysis of relationships and analysis of organizational principles. At this point, the leader will be in a better position to help individual school boards on a technical assistance level.

The question for the leader is, are you going to throw egg at the wall or are you going to practice what you preach--quality workshop leadership and quality representation for local control?

In any case, all workshop leaders are advised to review all the material, the transparencies and the workshop exercises before making the first presentation in public.

Workshop Difficulty

The School Board (Management Team) Self-Assessment workshop requires the highest level of leader skill and knowledge. On the surface, it is very easy for someone to hand out and score a questionnaire which is an essential element of the workshop. However, returning the data to a specific board in a technical assistance mode requires the highest level of skill and knowledge on the part of the workshop leader. The leader must have skills in group dynamics and conflict resolution. In addition, in order to help the participants get the most out of the experience, the leader should have a firm foundation in the psychology and philosophy of feedback systems as well as an understanding of organizational psychology and school boardsmanship.

Organizing for Learning

The School Board (Management Team) Self-Assessment workshop is designed to bring together the personal experiences of the participants with the new experiences and information presented in the workshop. Consequently, the most effective way to use the materials and to organize the workshop is to create an environment that facilitates interaction of the participants with the new information. Conversely, the least effective way to use the materials is to lecture the participants. As a workshop leader, you should have some notion about the learning theory upon which this program is constructed. A concept paper on this subject is included in the resources section of this notebook.

The most appropriate arrangement for the room is one with tables to accommodate seven to ten people organized in such a manner that all the participants can see a central projection area. If small group arrangements are not possible, attempt to provide for arrangements where the people can move around during the worksessions.

Each workshop leader is encouraged to adjust, add or remove parts of this workshop to meet his/her style and the participants' needs. It won't be yours until you change it.

Depending upon the workshop leader's goals, the groups can be either organized around "home groups" or "stranger groups."

Use of Transparencies

The transparencies in this workshop serve a rather unique function, the same function for the workshop leader as "cue" cards do for TV broadcasters. The transparencies have been designed to free the workshop leader from the "written page" of the Leader's Guide. The transparencies carry in an abbreviated form the main points of a lecturette or some other information that is to be provided by the leader. Consequently, with just a little homework, the leader should be in a position to display the transparency and expand the abbreviated points through a lecturette or directions. The key is to free oneself from the podium or central stage and walk around while delivering the message.

Warning: Do not attempt to deliver this program without first reviewing and coordinating the transparencies with the various activities in Section 3 of the workshop.

Do not use the program in a structured lecture hall where participant interaction is restricted. The exercises and program are designed for interaction, not a lecture.

Equipment and Materials Needed

- Newsprint paper and markers
- Masking tape
- Workbooks
- Overhead projector
- Spare projector bulb
- Blackboard
- Transparency markers

SCHOOL BOARD (MANAGEMENT TEAM) SELF-ASSESSMENT

SECTION 3: PRESENTING THE WORKSHOP

Introduction to Large Groups

Introducing the idea of self-assessment to large groups or at state school board conventions can be successful. The purpose in the case of large groups is to present the audience with the need and the concepts supporting the notion of "feedback." It does not work well to attempt to have groups of school boards complete the self-assessment in large groups.

TIME		MATERIALS
Total Time: 65 min.	**Activity 1: Presentation to Large Groups** Leader Focus: The purpose of a large group presentation would be to stimulate participants' use of the instrument with their total board in a "back home situation." In addition, it will serve the group well to introduce them to the notion of "organizational health" which served as the theoretical basis of this instrument.	
6 min.	o Leader Instructions: Distribute the booklet, "Self-Assessment: A Workshop." The booklet should include: — Cover — Self-Assessment Instrument (first page only) — Category Analysis (Sample)	Booklet, Self-Assessment: A Workshop Trans. SA 1
	o Leader Lecture: The management of every organization has a decision to make about two issues. — First, how are they going to treat the employees, the consumers and each other? These are called the human concerns of the organization.	Trans. SA 2a

TIME			MATERIALS
5 min.		— Second, how are they going to identify and pursue the goals and objectives of the organization? These are called the "task" or the "purpose" concerns of the organization.	Trans. SA 2b
	o	Involved in this decision is the basic assumption that managers (school board and superintendent) have about the most efficient, effective method to achieve the organization's (school's) goals.	
2 min.	o	For example, will we be more likely to achieve the school's goals with:	
		— More teamwork?	
		— Moderate amount of teamwork?	
		— Little teamwork?	
	o	Should the "team" include all the administrators?	
	o	Should the team include teachers?	
	o	Where do parents fit in the team?	
	o	How about students?	
2 min.	o	The basic question appears to raise the problem: Who should be involved for how much with what authority to achieve what goals and objectives?	
	o	The basic question has to be asked about each of the human concerns and task concerns of the organization.	Trans. SA 3
2 min.	o	For example, if the goal of the school is to improve student learning (achievement):	
		— Should parents be involved?	
		— How often should they be involved? Where should they be involved? What should they do?	
		— How much authority should they have compared to the teachers, the principals, the superintendent or the school board?	

TIME			MATERIALS
		— Does it really improve learning?	
2 min.	o	Point of interest--School improvement research indicates that children will learn more if their parents are involved in their classrooms.	
	o	Another example: If the goal of the school board is to provide for efficient, effective learning, where, how much and for what purpose should they be involved in the learning program?	
2 min.	o	The human concerns of the organization are:	Trans. SA 4
		-- Communication processes	
		— Motivation concerns	
		-- Decision making	
		— Leadership	
		-- Team building	
2 min.	o	The task concerns of the school organization are:	Trans. SA 5
		— Goals and objectives	
		— Control and accountability procedures	
		— Coordination processes	
		— Planning	
		— Policy	
2 min.	o	The next question that might be asked is: Are all people, or school board members or superintendents, equally concerned about the human concerns and the task concerns of the organization?	
2 min.	o	NO, NO, NO, NO, NO. Different people have different levels of concern and different points of concern.	
		— Some people are more concerned about the task and not sensitive to the human concerns. "Get the job done. Don't worry about feelings."	

TIME			MATERIALS
		— Others are more concerned about human relations. "Run a happy ship. Don't worry about the task. Don't upset anyone."	
	o	Balance between task concerns and human concerns appears to be important.	
2 min.	o	However, Schutz* found:	
		— Some communities want task-centered leadership from their school board and administrators.	
		-- Other communities want human-centered leadership from their school board and administrators.	
		— Leadership styles that were effective in one community were not effective in another.	
2 min.	o	These three findings lead to the most important questions for today's workshop.	
		— What do we expect of each other as school board members or as management team members?	Trans. SA 6
		-- What does our community expect of us?	
		— Is this the most effective style?	
2 min.	o	The School Board (Management Team) Self-Assessment instrument gives us a tool to examine our human concerns and task concerns, both as individuals and as a total team.	
	o	Organizational theorists and organizational psychologists tell us that in our country at this time in history we are likely to make the most gains if we have a balanced concern for task needs and human needs.	
	o	The self-assessment instrument measures the task concerns and the human concerns of the management team or school board.	

*Schutz, Will. Leaders of Schools, University Associates, Inc., LaJolla, California, 1979.

TIME		MATERIALS
6 min.	o THERE IS NO RIGHT ANSWER. Each board will have a different concern level.	
	o The School Board Self-Assessment (SBSA) is designed to collect the participants' perceptions on two levels. A "NOW" column represents the participants' perception of how much there is now of a given characteristic.	
	o The "WISH" column represents how much they wish there were of a given characteristic.	
	o Each item in the "NOW" column and the "WISH" column is rated on a scale of 1-7.	
	o The actual numeric value each participant gives an item has no real meaning other than the discussion it stimulates between the participants.	
	o After the averages for all respondents to each item in the "NOW" column and the averages for each item in the "WISH" column are calculated and compared, it may well present the management team with some interesting pictures about its perceptions.	
	o For example, if the average of the responses were:	
	1.1 How friendly and easy is it for you to approach the other members of your school?	Trans. SA 7
	NOW 2.1 WISH 7.0	
6 min.	o The above response might well suggest that the "average" perception of board members is that their board is not friendly and easy to approach. However, one board member might have marked the instrument like the example below:	
	1.1 How friendly and easy is it for you to approach the other members of your school?	Trans. SA 7
	NOW 7.0 WISH 7.0	

- The above example would suggest that at least one board member was very pleased with how friendly and easy it is to approach the board. The differences between individual responses will provide the basis for some very interesting discussions.

- In another case, the session leader may find the following average response:

1.4 To what extent do members of your school board encourage each other to work as a team? — Trans. SA 7

NOW	6.8
WISH	5.1

- This response might well suggest that the school board members wish they would do a little less work as a team. Again, this should stimulate an interesting discussion.

- The following transparency represents the categories (Team Building, Decision Making, etc.) within the SBSA. — Trans. SA 8

2 min.

- Team Building — Trans. SA 9

  — The school board is in a rather unique position: each member has to be part of a team to achieve the school's purposes and, at the same time, has to maintain his/her individuality and loyalty to a constituency.

  — Items 1.1 - 1.7 on the SBSA collect the management team's perceptions about its cooperation as a team.

  -- The important point to note in this category is how much teamwork do they want?

  -- Do they want more or less? Teamwork is determined by: common goals (1.5); sharing (1.3); caring (1.1, 1.2); encouragement (1.4); and mutual trust (1.6, 1.7).

TIME			MATERIALS
2 min.	o	Decision Making	Trans. SA 10
		-- Items 2.1 - 2.4 assess the decision making process.	
		-- Especially important to note are items 2.3, perceived influence, and 2.4, disagreements.	
2 min.	o	Management	Trans. SA 11
		— Items 3.1 and 3.2 measure the school board's concern about management, another task concern.	
2 min.	o	School Improvement	Trans. SA 12
		— The most recent research available suggests that the school board should control the most important variables that influence student achievement--textbooks, principals, teachers and time. Items 4.1 - 4.6 measure the management concerns about these issues. Many theorists suggest that learning and student achievement should be one of the most important tasks of the school board.	
2 min.	o	Community	Trans. SA 13
		— Still another task concern of the school board is its interaction with the community. The interaction is seen as a two-way process as measured by 5.1 and 5.2. As noted in the items, the board has the responsibility to carry the community's message to the schools and the schools' message to the community.	
2 min.	o	Planning	Trans. SA 13
		— The planning functions assessed in items 6.1 - 6.3 really are indicative of board authority.	
		-- Unless the board is establishing long term plans and direction for the schools, it is questionable whether they are in control.	
		— The question is, "What is the board doing? Is the board reacting or planning?"	

TIME			MATERIALS
2 min.	o	Communications	Trans. SA 14
		-- Management team communications are assessed in items 7.1 - 7.3.	
		-- Everyone on the management team must "feel" an adequate amount of communication is taking place or they are likely not to be as cooperative.	
2 min.	o	Motivation	Trans. SA 15
		— Motivation is measured by the respondents' perceptions of their commitment, 8.1 - 8.4, and their perception on how others treat them, 8.5.	
		— The issue here is that one's commitment to 8.1 - 8.4 will seldom (never) be greater than his/her perception of how others take their needs into account.	
2 min.	o	Influence	Trans. SA 16
		-- Everyone needs to feel that he/she is motivated. Actually, items 5.1 - 6.3 measure motivation in different ways.	
		— If members of the team feel they do not have influence or are of little worth they probably won't give their best effort.	
2 min.	o	Policy	Trans. SA 17
		— The last category, policy, is probably the most important tool of the school board.	
		— The school board, through policy, manages and controls the district.	
		— The school board can increase its participation in the instructional program through policy, change decision making through policy, improve communication with policy and improve planning through policy. Policy puts the school board in the planning mode and takes it out of the reacting mode.	
		— Items 10.1 - 10.4 measure the management team's policy concerns.	

TIME		MATERIALS
Total Time: 18 min.	Activity 2: How Does the SBSA Process Work?	
	Leader Focus: The purpose of this activity is to explain how a school board can become involved with the SBSA process.	
5 min.	o Leader Lecture: YOU MIGHT ASK, HOW DOES OUR SCHOOL BOARD GET INVOLVED AND WHAT DO WE GET?	
	o First, make contact with your state school boards association.	
	-- If all of your board members are ready, they can send you the material in the mail.	
	-- Or they can arrange a meeting with your board to explain the process.	
	o After the board has completed the SBSA instrument, a "feedback session" will be arranged.	
2 min.	o At the feedback session, you will get back:	
	— Your personal SBSA instrument with your secret name on it.	
	— Category Analysis At this point the workshop leader should demonstrate how the category analysis works.	Trans. SA 8 Booklet Page 2
	-- Item Analysis (not in the workbook) Demonstrate how item analysis works.	Trans. SA 9-17
	-- Item Frequency Count (not in the workbook) Demonstrate its use.	Trans. SA 18 (a,b,c)
2 min.	o Go on to explain that questions will be analyzed and that the board will have an opportunity for group discussions and interaction.	

TIME			MATERIALS
2 min.	o	Explain that this may be a time the board wants to set some goals to change either its — Human concerns or its — Task concerns	
2 min.	o	Allow time for questions and discussion from the audience.	
5 min.	o	Close the session by reminding them that organizational norms and growth start at the "top." The school board is the top of the local school.	
	o	Ask them, ARE YOU GOING TO SET THE EXAMPLE?	
	o	CONTACT YOUR SCHOOL BOARD ASSOCIATION.	

Helpful Hint: You may get some questions about conducting the feedback session in a public meeting. You can tell them there has been no problem with the feedback session in public. You might also tell them some boards have held the feedback session at a retreat and other boards during an executive session of the board because it is a personnel matter. A lot depends on the state law and the local press.

PREPARING FOR THE FEEDBACK SESSION

Instructions

The association leader may be be called upon to introduce the concept or need for school board self-assessment. The concept papers "A Theoretical Base for an Information Feedback Model" and "School Board Self-Assessment and Feedback" will provide the association leader with the necessary background for this assignment. In addition, the association leader will find it helpful to read the "Four Functions of a School Board," in the Resources section.

Introduction to Individual Boards

The self-assessment feedback process is a very personal process which is best delivered in the group that generated the information. The time requirments for delivery to an individual board are:

a.	Introduction	30 minutes
b.	Completing the self-assessment by the school board	20 minutes
c.	Conducting the feedback session	Min. 1 hour Max. 3 hours

The feedback session will vary from an absolute minimum of one hour to three hours or more, depending on the nature and needs of the individual school board. A school board that has some apparent concerns with the level of cooperation among board members and/or the superintendent will take more time. In these cases the association leader might arrange for more time.

Association Time

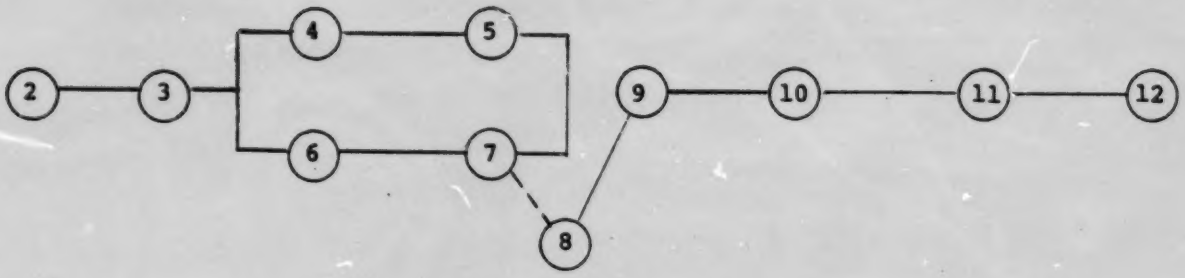
The school board association must also consider the amount of staff time it will take to deliver the service to an individual board. The time considerations listed here do not include travel time or the time for an introductory session. After an individual board has completed the School Board (Management Team) Self-Assessment profile and mailed the completed forms to the association office, the following time allocations should be considered:

a.	Data computation and analysis (see Figures 1 and 2)	2 hours
b.	Category analysis (Figure 3) and item analysis transparencies and materials	1 hour
c.	Feedback session arrangements and preparation	1 hour
d.	Conducting the feedback session	1-3 hours

The organizational leader should keep in mind when arranging the facilities for delivery to a small group that the purpose of the session is communication. A smaller, cozy room with chairs and tables arranged in a circle assists the communication process. Try to keep out of large rooms. The leader will need the following equipment:

a. Overhead projector with extra bulb
b. Chartpak paper or chalkboard
c. Projector screen or blank wall

THE FEEDBACK CYCLE FOR AN INDIVIDUAL SCHOOL BOARD



1. Materials sent
2. Completed forms mailed to the association office
3. Analysis started
4. Means tabulated (Figure 2)
5. Item transparency completed (Figure 4)
6. Category means tabulated (Figure 2)
7. Category transparency completed (Figure 3)
8. Agenda, feedback session date; facilities and equipment arrrangements completed
9. Individual materials completed
10. Feedback session started
11. Feedback session completed
12. Evaluation completed

Sending Materials for Feedback Session

School board self-assessment materials should be sent to or delivered to the participating school board, preferably the chairman. Each participant should receive school board self-assessment instructions and the self-assessment instrument.

Preparing the Data for the Feedback Session

After the association receives the completed self-assessment instruments from the local school board, the association representative should complete the following items:

1. Read and follow the directions headed STEPS FOR ANALYSIS.

2. The association representative will find it useful during the feedback session if the "HOW MUCH NOW" and the "I WISH IT WERE" scores are tabulated in the same manner on the self-assessment form as presented in Figure 2.

3. Make a copy of Figure 3 and Figure 4 for the superintendent and school board chairman. Do not hand these out until after the feedback meeting is over.

4. Make a transparency copy of Figures 3 and 4 to use in the feedback session. Be sure to use water soluble pens.

5. Call the superintendent and ask for a place on the agenda for the feedback session.

6. Feedback sessions can be held successfully in public meetings and closed board sessions. However, there appears to be a better opportunity to create an open environment in a closed session where the participants will feel free to discuss the items. This decision is dependent upon state law and local politics.

STEPS FOR ANALYSIS

You will be calculating an individual score for each item and a score for each category. First, the steps will be listed for each individual item. Next, the items should be clustered for category analysis.

Individual Item Mean

1. From the NOW column add the numbers from each school board member's self-assessment survey for the first item. The first item is "To what extent does the management team establish its own yearly goals and objectives?" If the first management team member answers "three" and the second member answers "five" to that question, you would add three and five and so on to get a total (see Figure 1). You will find it helpful at a later date if you use a copy of the School Board Self-Assessment Rating Sheet to tally the responses for each item (see Figure 2). Perhaps your secretary can perform this function.

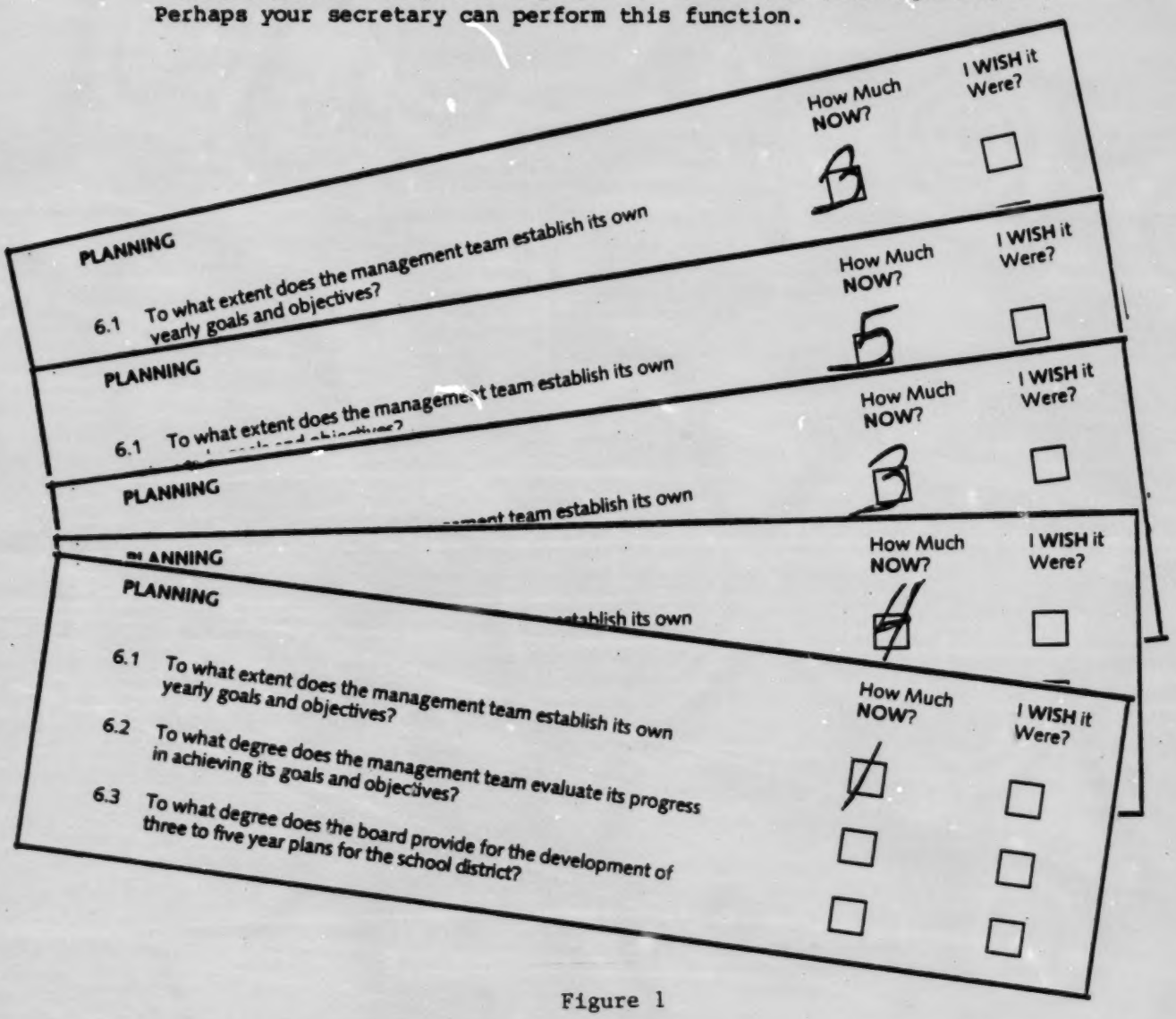

PLANNING
How Much NOW?
I WISH it Were?
6.1 To what extent does the management team establish its own yearly goals and objectives?
6.2 To what degree does the management team evaluate its progress in achieving its goals and objectives?
6.3 To what degree does the board provide for the development of three to five year plans for the school district?

Figure 1

2. Divide that total by the number of management team members. Total divided by Number of Management Team members equals Mean for item. For example, 3 + 5 + 3 + 4 + 1 + 3 + 7 + 3 = 29 - 8 = M 3.63 (see Figure 2).

3. The number that you have is called a mean for that item. Continue to repeat steps 1 and 2 for each item on the survey in the NOW column. Then do the same for each item on the survey in the WISH column. Use a separate School Board Self-Assessment Rating Sheet to tally the WISH items.

Category Means

1. In order to get a mean for each category (such as team building or planning), add the means in the NOW column for all means in that category (see Figure 2).

2. Divide the sum of the means by the number of items in that category. For example, in Figure 2 you should add 3.63 + 3.00 + 3.63, which equals 10.26. There are three items in the planning category; therefore, 10.26 - 3 = 3.42, which is the category means.

3. Use the same procedure to determine means in each category for the WISH column.

School Board (Management Team) Self-Assessment
Item Frequency Count

	NOW	NOW MEAN	WISH	WISH MEAN
6.1	35341373	3.63		
6.2	41631252	3.00		
6.3	22362761	3.63		
	TOTAL MEAN	3.42	TOTAL MEAN	

Figure 2

Plotting the Results: Category Analysis

1. Using the category means, plot the point for each category for the "Now" mean on the Management Team Profile. Plot points for each of the other category means (decision making, functions, planning, etc.). Connect the plotted points with a continuous line. This line shows how, on the average, the management team sees itself operating NOW in each of the categories (see Figure 3).

2. Plot the points using the category means for the WISH columns for each of the categories. Connect these points with a dotted line. The dotted line will show how the management teams WISH it were with regard to each of the categories.

3. Now, on the same chart (see Figure 3), you should see both the NOW rating for each category and the WISH rating for each category for the board (team) as a whole group. You are ready to look at the discrepancies in any category between the NOW situation and the WISH situation.

4. As you present the analysis to the board, you will probably be most concerned with the categories which show the greatest discrepancy between NOW and WISH. You will be less concerned about a rank of seven in any category, or about comparison between categories.

Plotting the Item Means

1. Using the individual "item means" for the NOW column, plot the mean point for each item on the School Board Self-Assessment Rating Sheet. Connect the plotted points with a continuous line. This line presents an average plot on how the management team sees itself for each item (see Figure 4).

2. On the same School Board Self-Assessment Rating Sheet, repeat the same process for the WISH column, except this time connect the mean points with a dotted line (see Figure 4).

3. You now have on one chart an item analysis that graphically represents the differences between the NOW column and the WISH column.

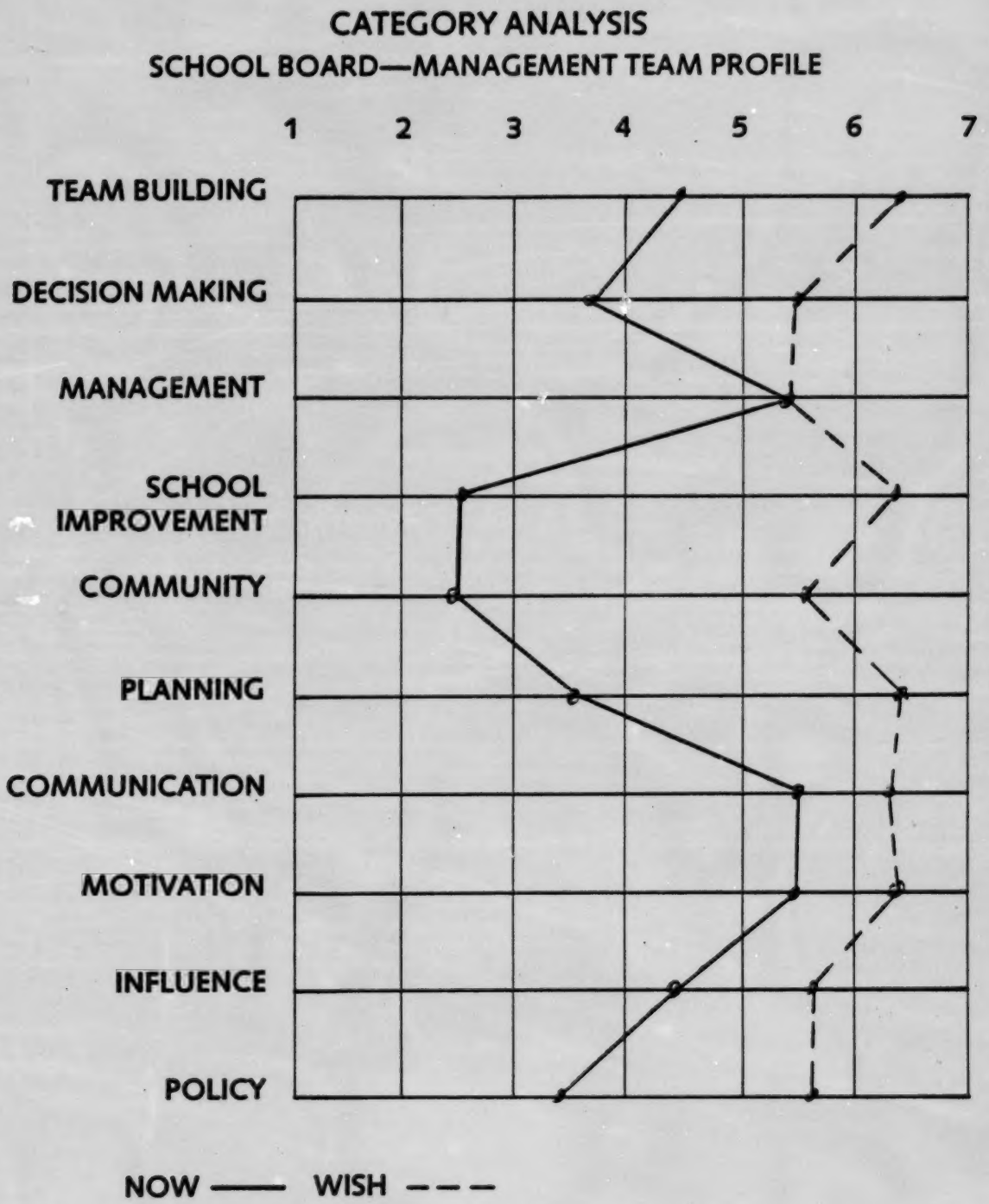
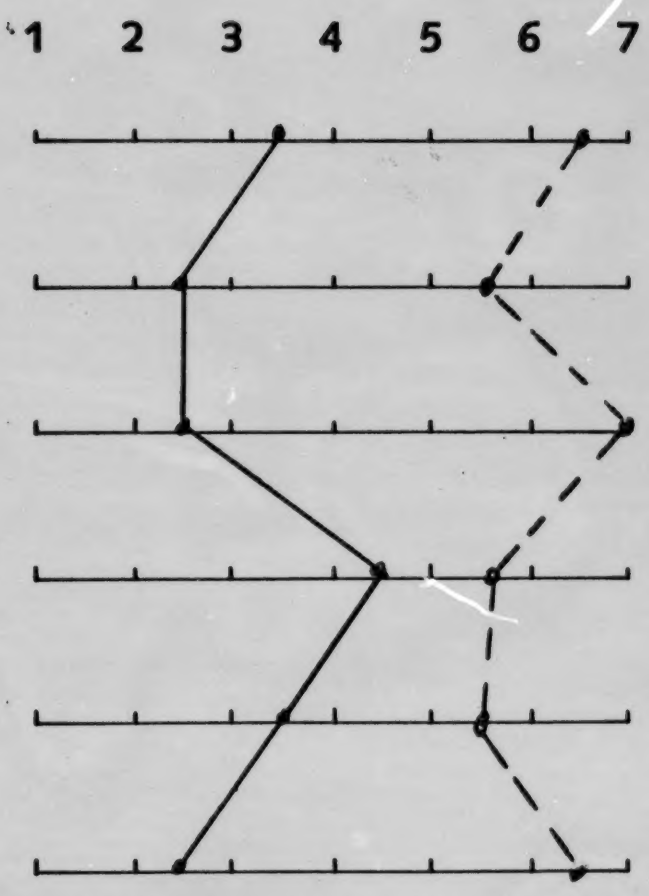

CATEGORY ANALYSIS
SCHOOL BOARD—MANAGEMENT TEAM PROFILE
1
2
3
4
5
6
7
TEAM BUILDING
DECISION MAKING
MANAGEMENT
SCHOOL IMPROVEMENT
COMMUNITY
PLANNING
COMMUNICATION
MOTIVATION
INFLUENCE
POLICY
NOW
WISH

Figure 3

SCHOOL IMPROVEMENT



4.1 Policy for evaluation of teachers and administrators

4.2 Time assigned for learning issues

4.3 Time assigned for classroom observations

4.4 Policy for selection of learning materials

4.5 Discussion of student achievement

4.6 Substance and process of teaching and learning?

Figure 4

NOW ——— WISH – – – –

TIME		MATERIALS
Total Time: 2 hours	Activity 1: The Feedback Session (Technical Assistance)	

Leader Focus: The purpose of the feedback session is to encourage the participants to analyze the differences between what they perceive they are doing "NOW" for each item and how much they "WISH" they were doing.

The second purpose for the feedback session is to encourage the participants to discuss the way they want to approach each of these items in the future. Of course, analysis is the higher level of thinking and will take more time.

The association leader should note that there is no best answer. Each school board must be encouraged to set its own standards. The feedback leader must be careful not to be trapped into becoming the "answer man." The feedback leader's role is to facilitate healthy communication between the board members. The feedback leader is not one of the participants. Stay out of the discussions. The process is really quite natural if the leader will let it happen. Do not force the group to go into deeper discussions if they are hesitant. It means they are not ready.

- Leader Instructions: Hand out participant feedback session booklets according to the "secret name or number" on the SBSA instrument. The Feedback Session Booklet should contain in the following order: — Participant Booklets

  — SBSA Cover

  — SBSA Instrument for that person

  — Item Frequency Count for that group

  — Category Analysis completed for that group

  — Self-Assessment Worksheet 1

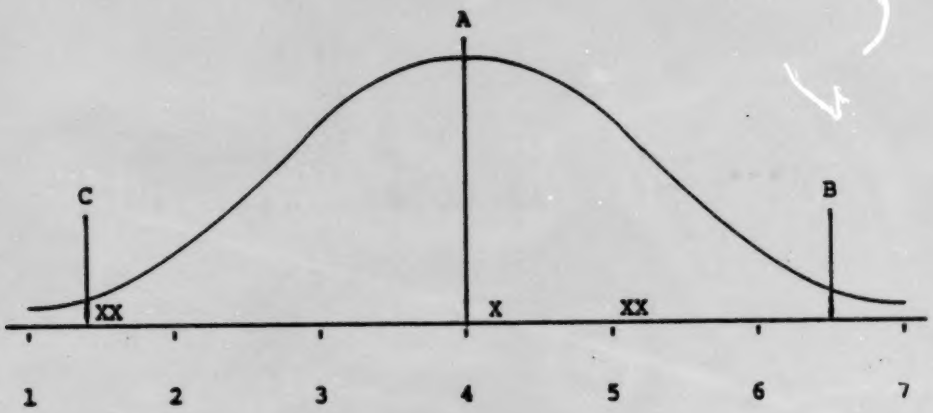
  — Concept paper

  — Evaluation form

- Review the philosophy, goals and objectives for the self-assessment process. Congratulate them for setting the example at the "top" of the school organization.

- Take a few minutes and draw on a chalkboard or on large paper (or use Trans. SA 22) a normal curve and explain "the data that will be reported to you represents the 'average' response of your board." (Do not put "X" in at this time. See the following page for an explanation of the "X".) Then draw line "A." Go on to explain that some people responded with a very high answer (draw line "B") and some participants responded with a lower answer (draw line "C").

TABLE 1



- Start the process by:

  — Place the first transparency SA 11 on the overhead. Read question 1.1. The transparency should of course have their data for the NOW and WISH columns. Trans. SA 11

  -- Read the question and point out the average response in the "NOW" category and the average response in the "WISH" category. Demonstrate where the average response is on the curve.

— Have the participants look at their answers and wait a few seconds.

— Point out the differences between the average "NOW" and "WISH" responses.

— Ask the participants if they have any questions.

— The discussion may be slow at first, but it will come--just let it happen.

— Next, go to the "normal curve" on the chalkboard and place an "X" where each board member marked the "NOW" column. Use your Frequency Count Chart to do this. Have them look at their SBSA Instrument. Ask the board members, "Would someone be willing to share why they marked this item as high as they did?" "Would someone be willing to share why they marked this item so low?"

— After an appropriate amount of discussion, go on to the next item, and so on.

— Repeat the same process for the "WISH" column.

— After you have discussed several items and when the "feeling" is right, try to get each board member to share how he/she marked the item and why.

— Again, don't press it; it may go slow at first but they will eventually start to share.

— After all the items in one category have been completed, go on to the next category.

— After all the categories have been completed, review the process using the "Category Analysis." Use their data.

— Point out categories where there appears to be the greatest congruence (see Figure 3); Decision Making, Planning, Motivation. <u>However, you should use their data</u>.

TIME	MATERIALS
— Point out the categories where there is the most apparent lack of congruence (see Figure 3); Team Building, Functions, Communication, Influence, Policy. This is just an example. Be sure to use their data.	

TIME		MATERIALS
Total Time: 65 min.	Activity 2: Goal Setting	
	Leader Focus: The purpose of this activity is to move the participants to set goals for growth in the "high concern areas," that is, the areas where there are the least amount of congruence.	
	o Leader Lecture: On the basis of the analysis presented after completion of the self-assessment exercise, the board members should select an area where they want to improve. This area will probably be the one that has the biggest discrepancy between the NOW and the WISH. (You may want to note areas such as motivation or influence. If there is a big discrepancy in the area of motivation, it may be symptomatic of a problem in another area, e.g., the board members are not motivated because they have communication problems or decision making problems. In those cases, they would be encouraged to set goals in the areas where the real need or problem exists.)	
	o Point out that for the purposes of this session the self-assessment process has already identified their areas of greatest concern.	
	o Suggest that now we are going to talk about the behaviors we can all observe that will help bring us together in our greatest area of concern.	
5 min.	o Have the participants choose the category in which they want to improve.	
10 min.	o Once the board has selected its area of focus, have the participants brainstorm goal statements in that area, such as, "Board behaviors." Give them an example: "We will work on listening to each other."	
	o Next take them through the problem solving sequence.	
10 min.	— Brainstorm a list of observable-visible behaviors that if the participants could see they would feel there is improvement in this area.	

— Use chart paks to write down goal behavior so that all can see. Chart Paks

— Push hard here. Get them to state their goals in board behaviors, that is, behaviors that are observable.

-- You may also need to help participants distinguish between goals for the board as a group and district or curriculum goals. Don't bring it up unless the question comes up. This process focuses on board goals. What new behaviors will we as board members exhibit to reach our goal?

10 min. — Next allow time for a discussion of the ideas from the brainstorm.

20 min. o Ask board members to select from the list their top two (or three) behavior statements on which they are willing to work. They may have some clear preferences as a group, or they may have some variance. Discussion should lead to agreement on the top two or three goals.

o Now have the participants turn to Worksheet 1 in their workbook and fill in the blanks. Worksheet 1

— Category of greatest concern

-- Areas of commitment

o Repeat the problem solving sequence if there is time and/or a need to do so. If you do repeat, hand out additional worksheets.

o Do not have the board work on more than two areas at one time.

10 min. -- Ask the board: "How will you know when you've achieved the goal?" Help participants set up criteria to evaluate the success of their plan. Use the butcher paper so that all can see. Discuss and agree on criteria and assessment of goals.

o Review with the board members the steps they have gone through so that they can repeat the process for other goal setting processes in the future. The planning activity is:

TIME		MATERIALS
	— Board goes through goal setting process.	
	— Brainstorm	
	— Categorize	
	— Rank, tally, discuss	
	— Select 1-3 (at most) goals	
	-- Board sets plan of action to achieve goals.	
	— Board sets criteria for determining if it has met its goals and a time for reviewing its success. (How will you know when you have achieved the goal?)	
	— Board implements plan.	
	-- Board evaluates achievement of plan at appropriate interval.	
	-- Board chooses another area and goes through same process or selects a different plan to achieve goals.	
	— Or board repeats self-assessment.	
	o Tell the participants that if they wish you will come back in six months to review their progress.	
	o Ask for questions.	
	o As the process ends, the school boards association leader will usually have an opportunity to offer the association's services for additional school board inservice or further technical assistance.	
	o Show Transparency SA 20 and discuss the services using the Keys workshops that your association is willing to offer.	Trans. SA 20
	o Just before the feedback session ends, distribute the evaluation forms and have the participants complete them and return them to you before the end of the session.	
	o Be sure to end the session on a positive note by congratulating the board for its leadership.	

- Encourage them. Praise them. Reward them. Support them. Tell them how great they are. Remind them that local control backed by our Constitution is the foundation of our democratic process.

- They are the front line of the democratic process.

- They are what the original founders of our country thought all the legislative bodies should be: unpaid, nonprofessional politicians.

TIME		MATERIALS
Total Time: 12 min.	Activity 3: Evaluation of Workshop	
	Leader Focus: Let participants know you are modeling behavior. "I'm having you evaluate this session, just like you should evaluate yourselves as a school board, just like you yourselves should evaluate your people and programs. If you don't evaluate, how else can you grow?"	
2 min.	o Leader Instructions: Pass out evaluation forms or refer the participants to the appropriate page in the workbook.	Evaluation Forms
10 min.	o Ask for individual evaluations. Tell them they have 10 minutes.	
	o Collect, read and tabulate the results.	

THE RELATIONSHIP OF SELF-ASSESSMENT CATEGORIES AND OTHER KEYS TO SCHOOL BOARDSMANSHIP WORKSHOPS

As a result of the self-assessment process the school board may determine that it has a need for further inservice workshops. The chart below relates the Keys to School Boardsmanship workshops to the categories of the self-assessment process to help you select the appropriate followup activities.

Self-Assessment Categories	Keys Inservice Workshops*
Team Building	1, 6, 13
Decision Making	1, 4, 7, 8, 9
Management	5, 6, 9
School Improvement	9, 11, 12
Community	2, 3
Planning	1, 6, 9, 13
Communications	1, 4, 5, 6
Motivation	2, 4, 11, 13
Influence	2, 4, 5
Policy	7, 8

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*Keys to School Boardsmanship Workshops

1. Board/Administrator Relations
2. Building Bridges: School Board Political Roles
3. Communicating with the Community
4. Conflict: Alternatives to Blowing a Fuse
5. Effective School Board Meetings
6. Management Team
7. Policy Development
8. Policy is Power
9. Program Evaluation: School Board Roles
10. What Do School Boards Do?
11. School Board Self-Assessment
12. School Improvement: A Tune the School Board Can Play
13. Teamwork: The Board and Superintendent in Action

SECTION 4: EVALUATING THE WORKSHOP*

Evaluation is the hallmark of a professional--a good teacher or workshop leader. A systematic planned evaluation is the only method we have to determine the effectiveness of our instruction and the achievement of the learners. This program was developed around four techniques of development and evaluation.

Topic teams and state review committees identified the goals of the workshop, and in some cases, the techniques. In addition, pilot tests, field tests and expert reviews were used at appropriate times during the development and evaluation phases.

*Evaluation data is on file in the Rural Education Program of the Northwest Regional Educational Laboratory, 300 S. W. Sixth Avenue, Portland, Oregon 97204.

SUMMARY REVIEW OF DEVELOPMENT AND PILOT TEST ACTIVITIES

SCHOOL BOARD (MANAGEMENT TEAM) SELF-ASSESSMENT

Topic Team

The Oregon component of the school board inservice program was responsible for the development of three topics: (1) Policy Making, (2) Communicating with the Community, and (3) Evaluation. The Executive Director of the Oregon School Boards Association (OSBA), Mr. Tom Rigby, appointed one OSBA staff member to work with each topic: Mrs. P. Fitzwater, Policy; Mr. J. Marten, Evaluation; and Mr. D. Dixon, Communicating with the Community. Mr. Rigby also appointed representative school board members and superintendents to serve on each topic committee.

State Review Committee

In addition to the topic teams made up of school board members and superintendents, Mr. Rigby appointed and convened a State Review Committee. The purpose of the State Review Committee was to provide a forum for the involvement of opinion leaders from allied educational agencies. In attendance at the meeting on January 24, 1979 were:

Mr. Tom Rigby, Executive Director, OSBA
Mrs. Pat Fitzwater, Training and Policy Specialist, OSBA
Dr. Milt Baum, Oregon Department of Education
Dr. Wright Cowger, Willamette University, Professor and school board member
Dr. Ron Petrie, Dean, School of Education, Portland State University
Dr. Jens Robinson, Superintendent
Dr. Ray Mullen, Superintendent, Tillamook Educational Service District
Mrs. Carol Williams, board member and President of the OSBA
Dr. Betty Tomblin, Northwest Regional Educational Laboratory
Dr. Leslie Wolfe, Northwest Regional Educational Laboratory

The State Review Committee made five recommendations:

1. The inservice programs should help clarify the role of the school board in public education.

2. The inservice programs need to emphasize the proactive role that can be played by an informed school board member.

3. The inservice programs must emphasize the dynamics that take place between board members, between the board and the superintendent, and between the community and the board.

4. The inservice programs must also be targeted to superintendents. The inservice materials should help create a dialogue between superintendents and school board members relative to their working relationship in a democracy.

5. The inservice program should be developed on several levels which should include materials that a superintendent can use with prospective or existing school board members.

Topic Team Explorations

The evaluation topic team composed of fifteen members held four meetings between April 1979 and September 1979. The topic team identified the following areas as inservice topics for development:

- School board self-evaluation
- Superintendent evaluation
- School board's role in program evaluation
- School board's role in teacher evaluation
- Inservice materials and activities should be developed to support the school board self-assessment categories of:
  - --Leadership
  - --Team building
  - --Decision making
  - --Planning
  - --Curriculum
  - --Communicating
  - --Motivation
  - --Influence
  - --Policy

Developmental Review

A number of people participated in the initial review of the first product, the self-assessment instrument. The reviewers included: OSBA staff members, topic team members, state review committee members, Washington School Directors Association members, policy board members and NWREL staff members. The final reviews and evaluations were conducted on three levels: pilot tests, field tests and expert reviews.

Pilot Test Activities

A pilot test was defined as a trial of the workshop conducted by Northwest Regional Educational Laboratory staff.

Pilot Test Activities

	Place	Date	No. of Participants	Presenter
1.	School 1, Oregon	Feb. 1979	15	Wolfe
2.	School 2, Oregon	Mar. 1979	12	Wolfe
3.	Community College, Oregon	April 1979	17	Wolfe
4.	School 3, Oregon	April 1979	22	Wolfe
5.	School 4, Oregon	June 1979	10	Wolfe
6.	School 5, Oregon	June 1979	10	Wolfe
7.	Idaho School Board State Convention	Nov. 1979	450	Tomblin
8.	Alaska School Board State Convention	Nov. 1979	72	Wolfe
9.	Montana State School Board Association	Nov. 1979	97	Wolfe
10.	Washington State School Board Convention	Dec. 1979	61	Wolfe

Evaluation of Pilot Test Activities

The materials and procedures in the manual were developed and tested with the cooperation of twenty-one school boards and their superintendents. The development and testing phase had four objectives:

- To test the readability of the material for use by school board members
- To test the notion that the participating districts would use the self-assessment and feedback process to set goals and work on their own towards the achievement of their goals
- To demonstrate that the self-assessment and feedback program would serve to stimulate a discussion of new thoughts about the work and interaction of the management team
- To analyze the patterns of intercorrelation among the self-assessment items within each category

The evaluation data from the participating school boards indicated that the final self-assessment instrument and support materials were within the readability and comprehension domain of the school board members and the superintendents. (See Table I.)

The second objective was tested through a series of structured telephone interviews with the superintendents of the participating districts. The phone interviews were conducted three months and six months afer the feedback session had been completed. During both interviews, 100 percent of the superintendents indicated that they felt the feedback process was helpful to their management team behavior. Sixty-five percent of the superintendents could cite two improvement objectives on which their boards were working. Nine percent of the superintendents gave examples of three feedback objectives. Twenty-six percent of the superintendents named one objective that they were working on as a result of the self-assessment feedback process.

The third objective was to test the assumption that the feedback session would stimulate a discussion of new thoughts about the work and interaction of the management team. The evaluation data indicated that the self-assessment feedback process did stimulate a lively interaction and discussion of both new and old ideas about the work and interaction of the management team.

The fourth objective was to analyze the patterns of intercorrelation among the self-assessment items. A factor analysis of the patterns of intercorrelation of the items within each category found that the items within each category correlated from .78 to .82.

A summary of the evaluation process appears to indicate that the self-assessment and feedback process is a valuable process for school board members and superintendents. Furthermore, the process appears to stimulate a discussion of new ideas and a realignment of old ideas about the management team process. The data also appears to support the notion that the school board and superintendent will work on their own without further assistance to meet objectives created as part of the feedback process. The self-assessment and feedback process is a stand-alone inservice program that will provide valuable information and feedback to the participants.

Followup Procedure

A followup study of the the school board members and the superintendents of six districts who completed the pilot test phase of the School Board Self-Assessment found some interesting results. Two followup telephone calls were made to the superintendent of each district.

The first set of questions asked:

1. "Now that you have completed the process, would you do it again?"

   a. All six said yes, they would do it again.

   b. Five out of six said they would like to do it again at the end of the school year.

2. "Did completing the process motivate you and your board to take some action that was suggested in the followup report?"

   a. All six superintendents said that they had started to develop action plans that were suggested in the followup session.

3. "What are your followup plans?"

   a. To improve long term planning

   b. To work on improving communication between board members and the board and the superintendent

   c. To become more involved in the learning and instructional process

   d. To improve the policy making and the policy review and evaluation process

A second followup telephone contact with each superintendent asked two questions: "How are your followup plans going?" "Are you really implementing an action plan?"

All six superintendents indicated that they were indeed taking action that was motivated by the self-assessment followup process. Each superintendent described a specific action that his board was taking.

A summary of the evaluation process appears to indicate that the self-assessment and feedback process is a valuable process for school board members and superintendents. Furthermore, the process appears to stimulate a discussion of new ideas and a realignment of old ideas about the management team process. The data also appears to support the notion that the school board and superintendent will work on their own without further assistance to meet objectives created as part of the feedback process. The self-assessment and feedback process is a stand-alone inservice program that will provide valuable information and feedback to the participants.

Field Tests

Field tests were defined as the initial activities conducted by school board association staff after the completion of the pilot test activities.

The self-assessment instrument was field tested in more than 30 sites in the five project states. As a result of the pilot tests, field tests and expert reviews, the instrument and procedures were adjusted for the final product.

Revisions

A number of revisions were made in the first draft of the self-assessment instrument. The categories of policy and planning were added. The original instrument was changed from a three-column response activity to a two-column response activity. In addition a number of readability changes were made.

TABLE I

Summary of the Evaluation Pilot Test Activities with Individual Boards

1. Were the directions

	Difficult to Understand		Somewhat Clear		Clear and Understandable		
	1	2	3	4	5	Mean	S.D.
School 1			2	3	2	4.0	.82
School 2				3	2	4.4	.55
School 3		1		5	1	3.9	.90
School 4			2	6	4	4.2	.71
School 5				2	4	4.6	.51
School 6				2	4	5.0	
SUM OF MEANS						4.4	

2. Were the questions

	Hard to Understand		Somewhat Clear		Clear and Understandable		
	1	2	3	4	5	Mean	S.D.
School 1				3	4	4.6	.54
School 2				1	4	4.8	.45
School 3			2	4	1	3.9	.69
School 4			1	4	7	4.5	.67
School 5				5	1	4.1	.37
School 6				5	1	4.6	.53
SUM OF MEANS						4.4	

3. Did this school board self-assessment ask questions that are important for school board members?

	No 1	2	Some 3	4	Yes 5	Mean	S.D.
School 1				2	5	4.7	.49
School 2				1	4	4.8	.45
School 3				2	5	4.7	.49
School 4			1	5	6	4.5	.67
School 5					6	5.0	
School 6			1	3	2	4.1	.69
SUM OF MEANS						4.6	

4. To what extent did the survey questions cause you to think about ideas that you had not considered before?

	Not at All 1	2	Some New Ideas 3	4	Many New Ideas 5	Mean	S.D.
School 1			3	3	1	3.7	.76
School 2			1	3	1	4.0	.71
School 3			3	3	1	3.7	.76
School 4			7	5	1	3.5	.66
School 5			1	4	1	4.0	.63
School 6			4	3		3.4	.53
SUM OF MEANS						3.7	

6. Did the analysis of the board self-assessment provide you with useful information?

	Definitely Not 1	2	Some 3	4	Definitely 5	Mean	S.D.
School 1				2	5	4.7	.49
School 2				3	2	4.4	.55
School 3		1		1	3	4.0	1.41
School 4			1	4	7	4.5	.67
School 5				1	5	4.8	.44
School 6			2		5	4.3	1.03
SUM OF MEANS						4.4	

7. Will the results of the board self-assessment help your board take action to improve its operation?

	Definitely Not 1	2	Some 3	4	Definitely 5	Mean	S.D.
School 1			3	3	1	3.7	.76
School 2			2	2	1	3.2	1.92
School 3			3	1	3	4.0	1.00
School 4			4	3	5	4.1	.90
School 5				1	5	4.8	.44
School 6			1	2	4	4.4	.78
SUM OF MEANS						4.0	

	School 1	School 2	School 3	School 4	School 5	School 6				
5. Did the survey cover all important areas for school boards? If no, what would you add?										
a. Need to spend more time on the specifics	x		x	x	x					
8. Give one example of action you would suggest to your board.										
a. We need more planning	x	x	x	x	x	x				
b. Should annually review long and short term planning goals	x	x	x	x	x					
c. We need to annually review policies and involve more people in the policy process	x	x	x	x	x	x				
d. Need more board workshops	x	x	x	x	x	x				
9. Any other comments about the self-assessment instruments or procedures?										
a. It was good to share our feelings with each other	x	x	x	x	x	x				
b. The first time our board talked to each other since the open meeting law	x	x		x	x	x				
c. It was done beautifully	x	x	x	x	x	x				
d. Needs to be done twice a year	x		x	x	x	x				
e. Bring the consultant back again	x	x	x	x		x				

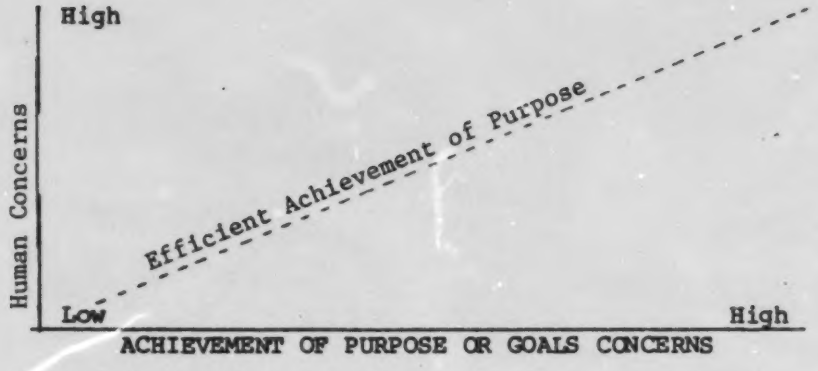
AN EXPLANATION OF
THE SCHOOL BOARD (MANAGEMENT TEAM) SELF-ASSESSMENT FOR PARTICIPANTS*

The purpose of the public school organization is to provide services in the form of education to the youth of the community effectively and efficiently. The words effectively and efficiently are stressed because we are living in a time of decreasing resources and increasing public concern about the purpose of the public school. The schools, like every organization, have three characteristics: purpose (goals), people and hierarchy.[1]

In the case of schools the people are represented in a number of groups: the local community, the national community, school board members, administrators, teachers, support staff and students. The people are there to help define and achieve the purpose of the school. The schools also have a hierarchy: some people are "bosses."[2] The "boss" for the schools is the school board. The school board delegates responsibility through policy to others in the organization.

The school board and the superintendent are responsible for bringing the people together to meet the school's purpose effectively and efficiently (see Table 1).

TABLE 1



*Lesle G. Wolfe, Ed.D., School Board Inservice Project, Northwest Regional Educational Laboratory, Portland, Oregon, July 1982

Efficiency and effectiveness are affected by three factors: the clarity of the purpose or goals of the schools, the willingness of people to cooperate to achieve the purpose, and the level of expertise or knowledge attained by the people in the organization. The more knowledge each group has about its own responsibilities and the responsibilities of the other groups, the more "power" they have when they are dealing with that group.

Human cooperation in the organization is influenced by their perception of six factors: teamwork, decision making, motivation, control, coordination, communication, influence and goal achievement. Goal achievement is influenced by the people's perception of planning and, in the case of top management (school boards), policy development. Therefore, cooperation to achieve the school's (organization's) goals is dependent upon the perceptions of the people. If everyone on a school board has about the same perception of how these factors are working "NOW" and they don't "WISH IT WERE" any different, then it can be said that there is a high degree of congruence and cooperation on the school board. If, on the other hand, one board member's perception of how the factors are functioning "NOW" is greatly different than another board member's perception of how the factors are functioning "NOW" it may then be said that there is a low degree of congruence between the two board members and possibly some conflict. In another case, a disgruntled board member may also be the result of "wishing" the factors were a great deal better than they are "NOW."

One method of measuring and understanding the perceptions of the board members is to use an instrument to collect their perceptions of these very important factors and then have them share their collective perceptions with one another. Such a process is called a data based feedback system. Completing the School Board (Management Team) Self-Assessment (SBSA) instrument is the first step in a "feedback" system for school board members.

The School Board (Management Team) Self-Assessment instrument is designed to collect the school board members' perceptions about team building, decision making, functions, planning, communications, motivation, control, coordination, influence and policy development.

The SBSA is designed to collect the participants perceptions on two levels. A "NOW" column represents the participants perception of how much there is now of a given characteristic. The "WISH" column represents how much they wish there were of a given characteristic. Each item in the "NOW" column and the "WISH" column is rated on a scale of 1-7. The actual numeric value each participant gives an item has no real meaning other than the discussion it stimulates between the participants. After the averages for all respondents to each item in the "NOW" column and the averages for each item in the "WISH" column are calculated and compared, it may well present the members of the management team with some interesting pictures about their perceptions. For example, if the average of the responses were:

	NOW	WISH
1.1 How friendly and easy is it for you to approach the other members of your school	2.1	7.0

The above response might well suggest that the "average" perception of the board is that their board is not friendly and easy to approach. However, one board member might have marked the instrument like the example below:

	NOW	WISH
1.1 How friendly and easy is it for you to approach the other members of your school	7	7

The above example would suggest that at least one board member was very pleased with how friendly and easy it is to approach the board. The differences between individual responses will provide the basis for some very interesting discussions.

In another case, the session leader may find the following average response:

		NOW	WISH
1.4	To what extent do members of your school board encourage each other to work as a team?	6.8	5.1

This response might well suggest that the school board members wish they would do a little less work as a team. Again, this should stimulate an interesting discussion.

The next several pages will present an explanation of the categories (Team Building, Decision Making, etc.) within the SBSA.

Team Building

The school board is in a rather unique position: each member has to be part of a team to achieve the school's purposes and at the same time has to maintain his/her individuality and loyalty to a constituency. Items 1.1 - 1.7 on the SBSA collect the management team's perceptions about its cooperation as a team. The important point to note in this category is, how much teamwork do members want? Do they want more or less? Teamwork is determined by common goals (1.5), sharing (1.3), caring (1.1, 1.2), encouragement (1.4) and mutual trust (1.6, 1.7).

Decision Making

Items 2.1 - 2.4 assess the decision-making process. Especially important to note are items 2.3, perceived influence, and 2.4, disagreements.

Motivation

Motivation is measured by the respondents' perceptions of their commitment, 8.1 - 8.4, and their perception on how others treat them, 8.5.

The issue here is that one's commitment to 8.1 - 8.4 will seldom (never) be greater than his/her perception of how others take their needs into account.

Management

Items 3.1 and 3.2 measure the school board's concern about management, another task concern.

School Improvement

The most recent research available suggests that the school board should control the most important variables that influence student achievement—textbooks, principals, teachers and time. Items 4.1 - 4.6 measure the management concerns about these issues. Many theorists suggest that learning and student achievement should be one of the most important tasks of the school board.

Community

Still another task concern of the school board is its interaction with the community. The interaction is seen as a two-way process as measured by 5.1 and 5.2. As noted in the items, the board has the responsibility to carry the community's message to the schools and the schools' message to the community.

Planning

The planning functions assessed in items 3.1 - 3.3 really are indicative of board authority. Unless the board is establishing long-term plans and direction for the schools, it is questionable whether it is in control. The question is, "What is the board doing? Is the board reacting or planning?"

Communications

Management team communications are assessed in items 7.1 - 7.3. Everyone on the management team must "feel" an adequate amount of communication is taking place or he/she is not likely to be as cooperative.

Influence

Of course, we all need to feel we are motivated. Actually, items 5.1 - 6.3 measure motivation in different ways. Items 5.1 - 5.5 are rather obvious measures of motivation; items 6.1 - 6.3 assess a perception of "worth" and "influence." If members of the team feel they don't have influence or are of little worth they probably won't give their best effort.

Policy

The last category, policy, is probably the most important tool of the school board. The school board, through policy, manages and controls the district. The school board can increase its participation in the instructional program through policy, change decision making through policy, improve communication with policy and improve planning through policy. Policy puts the school board in the planning mode and takes it out of the reacting mode.

THE FOUR FUNCTIONS OF THE SCHOOL BOARD

Introduction

School board members spend hundreds of hours a year in meetings, carrying out the work of the school district. Boards spend countless hours in discussion, deliberation, and decision making activities in a variety of areas, from setting educational goals to awarding contracts for fuel and establishing transportation routes.

While there are some variations in state laws regarding the duties, powers and responsibilities of the school board, the following four major areas are both common and typical.

- Providing for a program of quality instruction within available resources
- Providing for management and direction of the school system
- Providing for guidance of the school system through policy development
- Providing for communication between the school system and the community served by the schools

These are the four functions of the school board and while the board can, and often does, delegate the authority for carrying out these functions to the professional staff, it may never delegate the ultimate responsibility for them. The effective school board takes these functions seriously, and carries them out systematically.

The Four Functions: A Closer Look

Providing For a Program of Quality Instruction

School board members are local education leaders. While the school boards are feeling the impact of powerful national trends such as teacher demands in collective bargaining, court decisions regarding special needs of minority and other children, and administrative actions of state agencies regarding curriculum and instruction, the school board continues to have tremendous responsibility for the educational program. The school board can, in effect, establish what will be taught, how it will be taught, when and where it will be taught, to whom it will be taught, and with what materials it will be taught.

The school board employs a professional staff of administrators and teachers to manage and carry out the instructional tasks. The board can and should rely upon the expertise of the staff for advice and consultation about the instructional program. The board, however, can take a leadership role in such areas as:

- Assessing and reflecting the needs and values of the community in decisions relating to the instructional program
- Developing an educational philosophy to express the present and future needs of the community and children
- Establishing educational goals that reflect the philosophic position of the board
- Initiating program development activities consistent with the established philosophy and goals
- Reviewing curriculum materials and textbooks for their appropriateness for use in the school's instructional program
- Reviewing the instructional methods and alternatives for their compatibility and effectiveness in achieving educational goals
- Initiating systematic review and evaluation of all phases of the school program, including courses, programs, student achievement, and staff inservice activities

In addition, the school board can demonstrate initiative and leadership in other areas of the educational program, including:

- Field trips
- Class size
- Guest speakers
- Homework
- Guidance and counseling
- Grading practices

Providing For Management and Direction

School board members have a management responsibility. The board is a partner in the management team, along with the administrators it employs. While the board typically does not take part in the day to day operation at the school system, it does participate in a variety of management decisions. Among these are decisions in regard to:

- Bond elections
- Budget review and adoption
- Buildings and grounds maintenance
- Fiscal accounting
- Food services
- Negotiations
- Payroll procedures
- Personnel management
- Plant construction and renovation
- Purchasing
- Surplus property disposal
- Tax and debt management
- Transportation services

Again, the school board can rely upon the superintendent and other professional staff for expert advice in many of these decisions. Also, the board can direct the professional staff to conduct analysis, develop reports, and prepare recommendations in advance of board action.

Providing for Guidance of the School System Through Policy Development

School board members are local policy makers. The school board acts as a quasi-legislative body in establishing policies which guide the school system. When carefully designed, school board policies have the force of law at the local level. The guidance and control that the board provides through its policies are critical to the smooth operation of the school system, to giving the professional staff needed direction, and to relieving the board from hundreds of details.

Board policies are typically needed in such areas as:

- Instruction, including goals of education and programs
- Personnel (teaching and non-teaching)
- General administration, including relations between the board and superintendent
- Fiscal and business management
- Development of the physical plant
- Community relations

Additional policies and procedures, (often called bylaws), are typically needed for guiding the board's own operations, including meetings and committees.

Providing for Communication Between the Professional Staff of the School System and the Community Served by the Schools

Board members are spokespersons and interpreters. As elected local public officials, school board members are in a unique positon to make the presence of the school felt in the community, and the community values, needs, and views felt among the professional educators. This is the fourth job of the school board.

- Communicating with the Public

  Telling the school story to the public is probably one of the most crucial tasks facing school managers today. While ours is an age of public mistrust of government at all levels, the public expects to hear about and even participate in school affairs. The school board can take an active leadership role in communicating with the public, through news releases, feature stories, and provision for public participation in school board meetings. Speaking at meetings of the Grange, civic clubs, and the Chamber of Commerce are also effective methods of telling the school story.

- Promoting the Public Presence in the Schools

  The other part of the communication job is ensuring that the professional educator feels the public presence and hears the points of view being expressed in the community. Again, providing opportunities for this communication in the school board meeting is one good means to this goal. In addition, utilizing community advisory committees, conducting community-wide surveys, and establishing board-staff newsletters are effective methods to promote communication.

Management Team

Self-Assessment

a workshop

developed by
Leslie G. Wolfe, Ed.D

EXAMPLE

School Board (Management Team) Self Assessment

Below is a list of several characteristics or qualities connected with your position as a school board or management team member. As you rate the questions, it is important to think of the **school board and superintendent** as a management team. For each such characteristic you are requested to give two ratings.

a. How much is there **NOW**
b. How much do you **WISH** there were

For each of the items, please rate the questions on a scale from 1-7, where low numbers represent low or minimum amounts and high numbers represent high or maximum amounts. There are *NO* right or wrong answers. For example:

	How Much **NOW?**	I **WISH** it Were?
How rewarding is it to be a school board member?	2	5

TEAM BUILDING

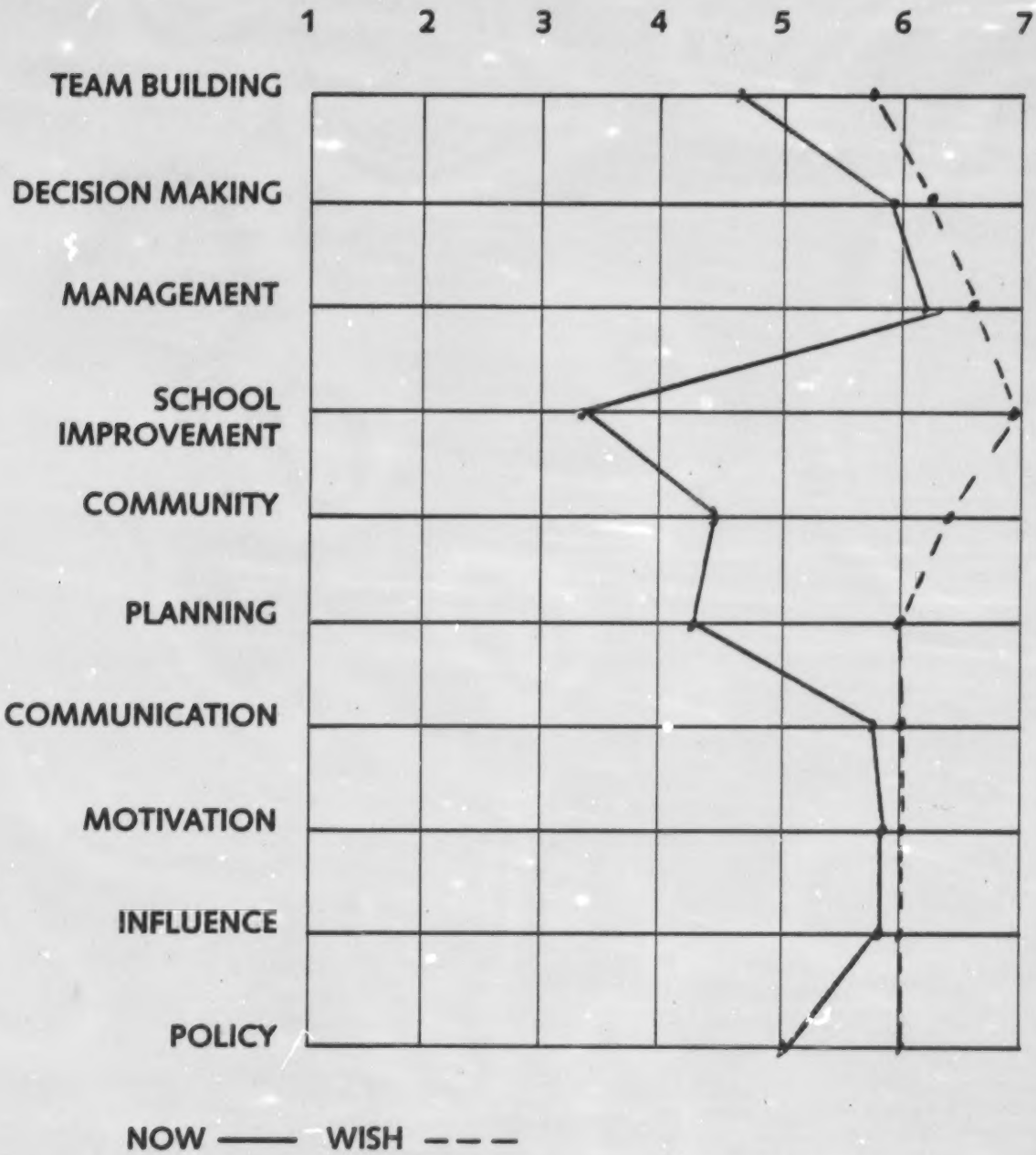
1.1	How friendly and easy is it for you to approach the other members of your school board?	3	7
1.2	As you talk with members of your school board how much do they pay attention to what you are saying?	☐	☐
1.3	To what length do members of your school board offer each other new ideas for solving problems?	☐	☐
1.4	To what extent do members of your school board encourage each other to work *as a team?*	2	6
1.5	To what degree do members of your school board emphasize school board goals?	☐	☐
1.6	To what degree do you feel other school board members have confidence and trust in you?	☐	☐
1.7	To what degree do you have confidence and trust in other school board members?	☐	☐

DECISION MAKING		How Much **NOW?**	I **WISH** it Were?
2.1	To what extent do the school board and superintendent use group meetings to talk things over with other administrators to get their ideas?	☐	☐
2.2	To what degree does your school board make good decisions and solve problems well?	☐	☐
2.3	Are all the members on your school board given the opportunity to influence the opinions of board members?	☐	☐
2.4	To what degree are differences and disagreements between members of the school board accepted as normal and then worked through rather than being neglected and allowed to continue?	☐	☐

EXAMPLE

CATEGORY ANALYSIS

SCHOOL BOARD—MANAGEMENT TEAM PROFILE



MAIL OUT MATERIAL

FOR THE SELF-ASSESSMENT

SCHOOL BOARD SELF-ASSESSMENT
Instructions

1. This questionnaire is built on the assumption that the superintendent is an important part of the school board management team. All school board members and the superintendent should complete the questionnaire.

2. The best way to complete this self-assessment is to have the board do it together at the beginning of a school board meeting. It will take about 15 minutes to complete.

   The second best method is to hand the questionnaire out at one meeting and have the members complete and return it before the next meeting.

   Please do not complete the questionnaire at the end of a meeting.

3. If some members do not understand the questions, please do not attempt to discuss or answer their questions. Simply tell them to do the best they can. If there is a concern about a particular question, have them circle it and we will discuss it at the next meeting.

4. Please be sure to put the name of your school district on the outside of the large envelope.

5. After placing all of the envelopes containing the individual board members' responses in the large envelope, please give the envelope to your superintendent for mailing.

The information gathered from this questionnaire will be shared only with the board itself. It is for your use only. The questionnaire will be scored, returned and explained by one of your school board association members at a future meeting.

School District _____ Secret Name or Number _____

SCHOOL BOARD (MANAGEMENT TEAM) SELF-ASSESSMENT

WHY EVALUATE?

Public concern in the job performance of its elected and appointed officials has increased the interest of school board members in the personnel evaluation process. Forward-looking board members and administrators are calling for evaluation processes that can be used to help the public schools plan for improvements. These same top level management people realize that personnel evaluation starts at the "top" with the board of education. The board of education can, through "modeling," set the appropriate climate for improvement by first evaluating its own interactions and goals. If the board of education knows where it is and where it is going, it will be in a stronger position to provide a solid front and leadership to the school staff and the community.

HOW WILL IT HELP?

This questionnaire was designed to provide you with a general assessment of the needs and interactions of your school board. The results of this questionnaire will provide you with information about your board's areas of greatest concern. You may find that your school board will choose to investigate several of the areas in greater depth. Your board may wish to use this information to plan its own program of professional growth.

HOW DO I START?

Please do not put your name on this survey. However, in order that your responses may be returned to you, use a secret identifying number or name (perhaps your driver's license number) on the top of this sheet. After completing the questionnaire, please seal it in the enclosed envelope and hand it to your chairperson. The responses will be scored by your school board association and returned to you by an association staff person at a future meeting.

School Board (Management Team) Self Assessment

Below is a list of several characteristics or qualities connected with your position as a school board or management team member. As you rate the questions, it is important to think of the **school board and superintendent** as a management team. For each such characteristic you are requested to give two ratings.

a. How much is there **NOW**
b. How much do you **WISH** there were

For each of the items, please rate the questions on a scale from 1-7, where low numbers represent low or minimum amounts and high numbers represent high or maximum amounts. There are *NO* right or wrong answers. For example:

	How Much **NOW?**	I **WISH** it Were?
How rewarding is it to be a school board member?	☐	☐

TEAM BUILDING

1.1	How friendly and easy is it for you to approach the other members of your school board?	☐	☐
1.2	As you talk with members of your school board how much do they pay attention to what you are saying?	☐	☐
1.3	To what length do members of your school board offer each other new ideas for solving problems?	☐	☐
1.4	To what extent do members of your school board encourage each other to work *as a team?*	☐	☐
1.5	To what degree do members of your school board emphasize school board goals?	☐	☐
1.6	To what degree do you feel other school board members have confidence and trust in you?	☐	☐
1.7	To what degree do you have confidence and trust in other school board members?	☐	☐

DECISION MAKING

		How Much **NOW?**	I **WISH** it Were?
2.1	To what extent do the school board and superintendent use group meetings to talk things over with other administrators to get their ideas?	☐	☐
2.2	To what degree does your school board make good decisions and solve problems well?	☐	☐
2.3	Are all the members on your school board given the opportunity to influence the opinions of board members?	☐	☐
2.4	To what degree are differences and disagreements between members of the school board accepted as normal and then worked through rather than being neglected and allowed to continue?	☐	☐

MANAGEMENT	How Much NOW?	I WISH it Were?
3.1 To what degree do you feel that the board has accepted its responsibilities to manage the school district?	☐	☐
3.2 To what degree do you feel that your board is in charge and gets what it wants?	☐	☐

SCHOOL IMPROVEMENT	How Much NOW?	I WISH it Were?
4.1 To what degree has your board by policy defined the goals and objectives of evaluation for teachers and administrators?	☐	☐
4.2 How often does your board talk about the amount of time you have assigned to the teaching of reading, math, writing/English and other learning issues?	☐	☐
4.3 How often do you review the amount of time principals need to spend in the classroom to supervise instruction?	☐	☐
4.4 To what degree has your board defined through policy a system for the selection and review of books and other learning materials?	☐	☐
4.5 How often is your board involved in a discussion of student achievement, test scores, course goals and objectives?	☐	☐
4.6 To what extent is the board working on the substance and processes of teaching and learning?	☐	☐

COMMUNITY	How Much NOW?	I WISH it Were?
5.1 To what degree does your board make the public presence felt in the educational establishment?	☐	☐
5.2 To what degree does your board sell the benefits of public education to the public?	☐	☐

PLANNING	How Much NOW?	I WISH it Were?
6.1 To what extent does the management team establish its own yearly goals and objectives?	☐	☐
6.2 To what degree does the management team evaluate its progress in achieving its goals and objectives?	☐	☐
6.3 To what degree does the board provide for the development of three to five year plans for the school district?	☐	☐

COMMUNICATIONS	How Much NOW?	I WISH it Were?
7.1 To what extent is information about important activities and circumstances shared among the school board members?	☐	☐
7.2 To what degree is the communication among persons on your school board honest and free from distrust and cover-up?	☐	☐
7.3 To what degree does your superintendent keep the school board informed about the school board's progress and matters affecting its work?	☐	☐

MOTIVATION	How Much NOW?	I WISH it Were?
8.1 How much do you enjoy performing activities of the school board?	☐	☐
8.2 How much do you feel a real responsibility to help the school district be successful?	☐	☐
8.3 As a group, how much commitment do your school board members have in performing their responsibilities?	☐	☐
8.4 How much responsibility do persons on your school board feel for attaining the goals of the school board?	☐	☐
8.5 To what degree are your interests and needs taken into account when decisions are made?	☐	☐

INFLUENCE	How Much NOW?	I WISH it Were?
9.1 How much say or influence do you have about what happens on your school board?	☐	☐
9.2 As a group, how much influence do members of your school board have on what other members of your school board do?	☐	☐
9.3 To what degree is your superintendent influenced by ideas and suggestions of your school board?	☐	☐

POLICY	How Much NOW?	I WISH it Were?
10.1 To what degree does your school board set policies?	☐	☐
10.2 To what degree does your school board actively seek the contributions of faculty, students and community members before drawing up a new policy?	☐	☐
10.3 To what extent are policies systematically evaluated for their effectiveness?	☐	☐
10.4 To what degree are board policies being administered without compromising the principles laid down by the board?	☐	☐

Management Team

Self-Assessment

technical assistance

developed by
Leslie G. Wolfe, Ed.D

SELF-ASSESSMENT WORKSHEET 1

Category of Greatest Concern_____

I am willing to commit myself to help improve in these behaviors.

1.

2.

3.

4.

5.

6.

7.

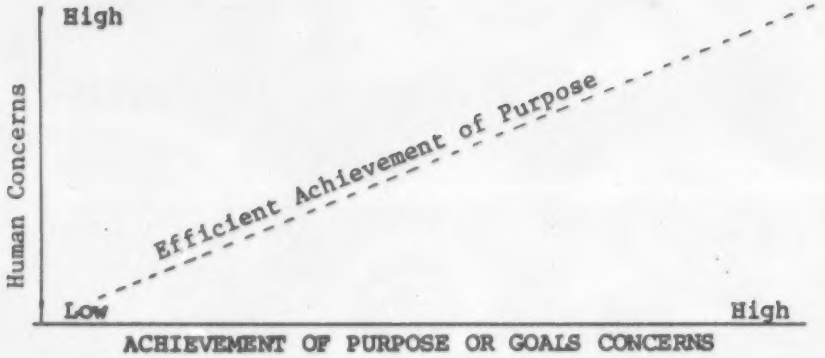
AN EXPLANATION OF THE SCHOOL BOARD (MANAGEMENT TEAM) SELF-ASSESSMENT FOR PARTICIPANTS*

The purpose of the public school organization is to provide services in the form of education to the youth of the community effectively and efficiently. The words effectively and efficiently are stressed because we are living in a time of decreasing resources and increasing public concern about the purpose of the public school. The schools, like every organization, have three characteristics: purpose (goals), people and hierarchy.[1]

In th case of schools the people are represented in a number of groups: the local community, the national community, school board members, administrators, teachers, support staff and students. The people are there to help define and achieve the purpose of the school. The schools also have a hierarchy: some people are "bosses."[2] The "boss" for the schools is the school board. The school board delegates responsibility through policy to others in the organization.

The school board and the superintendent are responsible for bringing the people together to meet the school's purpose effectively and efficiently (see Ta le 1).

TABLE 1



*Lesle G. Wolfe, Ed.D., School Board Inservice Project, Northwest Regional Educational Laboratory, Portland, Oregon, July 1982.

Efficiency and effectiveness are affected by three factors: the clarity of the purpose or goals of the schools, the willingness of people to cooperate to achieve the purpose, and the level of expertise or knowledge attained by the people in the organization. The more knowledge each group has about its own responsibilities and the responsibilities of the other groups, the more "power" they have when they are dealing with that group.

Human cooperation in the organization is influenced by their perception of six factors: teamwork, decision making, motivation, control, coordination, communication, influence and goal achievement. Goal achievement is influenced by the people's perception of planning and, in the case of top management (school boards), policy development. Therefore, cooperation to achieve the school's (organization's) goals is dependent upon the perceptions of the people. If everyone on a school board has abou the same perception of how these factors are working "NOW" and they don't "WISH IT WERE" any different, then it can be said that there is a high degree of congruence and cooperation on the school board. If, on the other hand, one board member's perception of how the factors are functioning "NOW" is greatly different than another board member's perception of how the factors are functioning "NOW" it may then be said that there is a low degree of congruence between the two board members and poesibly some conflict. In another case, a disgruntled board member may also be the result of "wishing" the factors were a great deal better than they are "NOW."

One method of measuring and understanding the perceptions of the board members is to use an instrument to collect their perceptions of these very important factors and then have them share their collective perceptions with one another. Such a proces is called a data based feedback system. Compl ting the School Board (Management Team) Self-Assessment (SBSA) instrument is the first step in a "feedback" system for school board members.

The School Board (Management Team) Self-Assessment instrument is designed to collect the school board members' perceptions about team building, decision making, functions, planning, communications, motivation, control, coordination, influence and policy development.

The SBSA is designed to collect the participants perceptions on two levels. A "NOW" column epresents the participants perception of how much there is now of a given characteristic. The "WISH" column represents how much they wish there were of a given characteristic. Each item in the "NOW" column an the " ISH" column i rated on a scale of 1-7. The actu l numeric value each partic pant ives an item has no real meaning other than the d scussion it stimulates between the participants. After h averages or all respondents to each item in the "NOW" column and the averages for each item in the "WISH" column are calculated and compared, it may well present the members of the management team with some interesti g pictures about their perceptions. For example, if the average of the responses were:

	NOW	WISH
1.1 How friendly and easy is it for you to approach the other members of your school	2.1	7.0

The above response might well suggest that the "average" perception of the board is that their board is not friendly and easy to approach. However, one board member might have marked the instrument like the example below:

	NOW	WISH
1.1 How friendly and easy is it for you to approach the other members of your school	7	7

The a ove example would suggest that at least one board member was very pleased with how riendly and easy it is to appraoch the board. The differences between individual responses will provide the basis for some very interesting discussions.

In another case, the session leader may find the following average response:

	NOW	WISH
1.4 To what extent do members of your school board encourage each other to work as a team?	6.8	5.1

This response might well suggest that the school board members wish they would do a little less work as a team. Again, this should stimulate an interesting discussion.

The next several pages will present an explanation of the categories (Team Building, Decision Making, etc.) within the SBSA.

Team Building

The school board is in rather a unique position: each member has to be part of a team to achieve the school's purposes and at the same time each member has to maintain his/her individuality and loyalty to a constituency. Items 1.1 - 1.7 on the SBSA collect the management team's perceptions about their cooperation as a team. The important point to note in this category is how much teamwork do members want? Do they want more or less? Teamwork is determined by common goals (1.5), sharing (1.3), caring (1.1, 1.2), encouragement (1.4) and mutual trust (1.6, 1.7).

Decision Making

Items 2.1 - 2.4 assess the decision making process. Especially important to note are items 2.3, perceived influence, and 2.4, disagreements.

Motivation

Motivation is measured by the respondents' perceptions of their commitment, 8.1 - 8.4, and their perception on how others treat them, 8.5.

The issue here is that one's commitment to 8.1 - 8.4 will seldom (never) be greater than his/her perception of how others take their needs into account.

Management

Items 3.1 and 3.2 measure the school board's concern about management, another task concern.

School Improvement

The most recent research available suggests that the school board should control the most important variables that influence student achievement—textbooks, principals, teachers and time. Items 4.1 - 4.6 measure the management concerns about these issues. Many theorists suggest that learning and student achievement should be one of the most important tasks of the school board.

Community

Still yet another task concern of the school board is its interaction with the community. The interaction is seen as a two-way process as measured by 5.1 and 5.2. As noted in the items, the board has the responsibility to carry the community's message to the schools and the schools' message to the community.

Planning

The planning functions assessed in items 3.1 - 3.3 really are indicative of board authority. Unless the board is establishing long term plans and direction for the schools, it's questionable whether they're in control. The question is, "What is the board doing? Is the board reacting or planning?."

Communications

Management team communications are assessed in items 4.1 - 4.3. Everyone on the management team must "feel" an adequate amount of communication is taking place or he/she is not likely to be as cooperative.

Influence

Of course, we all need to feel we are motivated. Actually, items 5.1 - 6.3 measure motivation in different ways. Items 5.1 - 5.5 are rather obvious measures of motivation; items 6.1 - 6.3 assess a perception of "worth" and "influence." If members of the team feel they don't have influence or are of little worth they probably won't give their best effort.

Policy

The last category, policy, is probably the most important tool of the school board. The school board, through policy, manages and controls the district. The school board can increase its participation in the instructional program through policy, change decision making through policy, improve communication with policy and improve planning through policy. Policy puts the school board in the planning mode and takes it out of the reacting mode.

SCHOOL BOARD (MANAGEMENT TEAM) SELF-ASSESSMENT
EVALUATION FORM

Directions: Circle the number which best represents your response.

1. To what extent did the survey questions cause you to think about ideas that you had not considered before?

1	2	3	4	5
Not At All		Some New Ideas		Many New Ideas

2. Did the analysis of the board self-assessment provide you with useful information?

1	2	3	4	5
Definitely Not		Some		Definitely

3. Will the results of the board self-assessment help your board take action to improve its operation?

1	2	3	4	5
Definitely Not		Some		Definitely

4. Give one example of action you would suggest to your board.

_____

_____

5. Any other comments about the self-assessment instruments or procedures?

_____

_____

RELATED TRANSPARENCIES

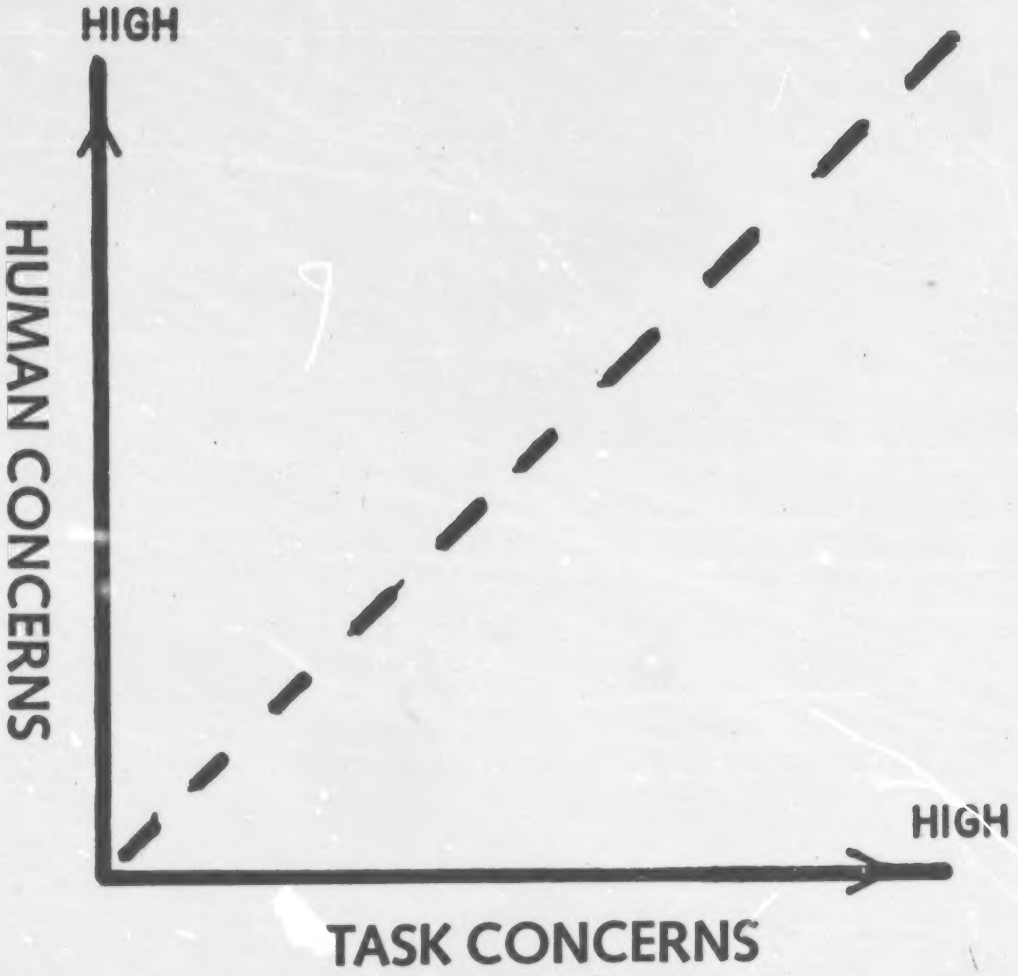
Management Team

Self-Assessment

a workshop

developed by
Leslie G. Wolfe, Ed.D

SA 1



SA 2A&B

BASIC QUESTION

- Who Should Be Involved
- How Much
- With What Authority
- For What Goals

SA 3

HUMAN CONCERNS

- Communication Processes
- Motivation Concerns
- Decision Making
- Leadership
- Team Building

SA 4

TASK CONCERNS

- Goals and Objectives
- Control and Accountability Procedures
- Coordination Processes
- Planning
- Policy

SA 5

WORKSHOP QUESTIONS

- What do we expect of each other as management team members?
- What does our community expect of us?
- Is this the most effective style?

SA 6

	Now	Wish
1.4 To what extent do members of your school board encourage each other to work as a TEAM?	6.8	5.1
1.1 How friendly and easy is it for you to approach the other members of your school board?	7.0	7.0
1.1 How friendly and easy is it for you to approach the other members of your school board?	2.1	7.0

SA 7

CATEGORY ANALYSIS

SCHOOL BOARD—MANAGEMENT TEAM PROFILE

NOW —— WISH – – –

SA 8

TEAM BUILDING

		1	2	3	4	5	6	7
1.1	How friendly is your school board?							
1.2	Do they pay attention?							
1.3	New ideas?							
1.4	Teamwork?							
1.5	School board goals?							
1.6	Trust in you?							
1.7	Trust in others?							

SA 9

DECISION MAKING

	1	2	3	4	5	6	7
2.1 Talk things over with administrators?							
2.2 Good decisions and solve problems?							
2.3 Influence the opinions?							
2.4 Differences are worked through?							

SA

MANAGEMENT

	1	2	3	4	5	6	7
3.1 Manage the school district?							
3.2 Board is in charge?							

SA 11

SCHOOL IMPROVEMENT

		1	2	3	4	5	6	7
4.1	Policy for evaluation of teachers and administrators							
4.2	Time assigned for learning issues							
4.3	Time assigned for classroom observations							
4.4	Policy for selection of learning materials							
4.5	Discussion of student achievement							
4.6	Substance and process of teaching and learning?							

SA 12

COMMUNITY

	1	2	3	4	5	6	7
5.1 Public presence felt?							
5.2 Sell the benefits of public education?							

PLANNING

	1	2	3	4	5	6	7
6.1 Yearly goals and objectives?							
6.2 Evaluate progress?							
6.3 Three to five year plans?							

SA 13

COMMUNICATIONS

	1	2	3	4	5	6	7
7.1 Information shared?							
7.2 Communication is honest and free?							
7.3 Superintendent keeps the board informed?							

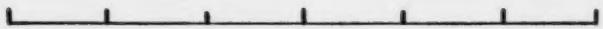
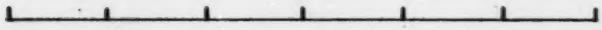
SA 14

MOTIVATION

	1	2	3	4	5	6	7
8.1 Enjoy the school board?							
8.2 Do you feel a responsibility?							
8.3 Group commitment?							
8.4 Responsibility for goals?							
8.5 Are your interests taken into account?							

SA 15

INFLUENCE

	1 2 3 4 5 6 7
9.1 Board influence?	
9.2 Influence on other members?	
9.3 Superintendent influenced by school board?	

SA 16

POLICY

		1	2	3	4	5	6	7
10.1	School board set policies?							
10.2	Actively seek contributions on policy?							
10.3	Policies are evaluated?							
10.4	Policies are administered?							

SA

School Board (Management Team) Self-Assessment

Item Frequency Count

	NOW	NOW MEAN	WISH	WISH MEAN
1.1				
1.2				
1.3				
1.4				
1.5				
1.6				
1.7				
	TOTAL MEAN		TOTAL MEAN	
2.1				
2.2				
2.3				
2.4				
	TOTAL MEAN		TOTAL MEAN	
3.1				
3.2				
	TOTAL MEAN		TOTAL MEAN	

SA 18A

Schooi Board (Management Team) Self-Assessment

Item Frequency Count

	NOW	NOW MEAN	WISH	WISH MEAN
4.1				
4.2				
4.3				
4.4				
4.5				
4.6				
	TOTAL MEAN		TOTAL MEAN	
5.1				
5.2				
	TOTAL MEAN		TOTAL MEAN	
6.1				
6.2				
6.3				
	TOTAL MEAN		TOTAL MEAN	
7.1				
7.2				
7.3				
	TOTAL MEAN		TOTAL MEAN	

SA 18B

School Board (Management Team) Self-Assessment

Item Frequency Count

	NOW	NOW MEAN	WISH	WISH MEAN
8.1				
8.2				
8.3				
8.4				
8.5				
	TOTAL MEAN		TOTAL MEAN	
9.1				
9.2				
9.3				
	TOTAL MEAN		TOTAL MEAN	
10.1				
10.2				
10.3				
10.4				
	TOTAL MEAN		TOTAL MEAN	

SA 18c

KEYS WORKSHOPS AVAILABLE

- Board/Administrator Relations
- Building Bridges: School Board Political Roles
- Communicating With the Community
- Conflict: Alternatives to Blowing a Fuse
- Effective School Board Meetings
- Management Team
- Policy Development
- Policy is Power
- Program Evaluation: School Board Roles
- What Do School Boards Do?
- School Board Self-Assessment
- School Improvement: A Tune the School Board Can Play
- Teamwork: The Board and Superintendent in Action

SA 20